PROFILE

TREATMENT CENTERS HOLDCO LLC

200 E BROAD ST STE 300 曲

GREENVILLE

SC 29601

+1 (800) 805-6989

http://crossroadstreatmentcenters.com

MSID M84000052198848

EIN 261171703

in.

http://www.linkedin.com/company/crossroads-cares

NAICS codes

621498 - All Other Outpatient Care Centers

621420 - Outpatient Mental Health and Substance Abuse Centers

813319 - Other Social Advocacy Organizations

621111 - Offices of Physicians (except Mental Health Specialists)

624190 - Other Individual and Family Services

541110 - Offices of Lawyers

622310 - Specialty (except Psychiatric and Substance Abuse)

Hospitals

621610 - Home Health Care Services

621491 - HMO Medical Centers

62 - Health Care and Social Assistance

and 2 others

500 - 999 employees	\$ 10M - 50M	revenue						
	2024	2023	2022	2021	2020	2019	2018	2017
Eligible Employees	396	490	446	353	319	262	196	157



FORUM BENEFITS INC ALERA GROUP - BENEFIT ADVISORS **NETWORK** Benefits Broker



VALMARK ADVISERS INC Retirement Advisor/Consultant



FORUM BENEFITS INC ALERA GROUP - BENEFIT ADVISORS NETWORK Benefits Broker



VALMARK ADVISERS INC Retirement Advisor/Consultant



ELLIOTT DAVIS Accountina Firm

- Accounting Firm										
Key Indicators	M									
KPI's	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega Wrap	M	M	M	M	M	M	M			
Collectively Bargained										
Self-funded Employee Benefits										
Filing with no Schedule A										
Multiple Employer (Welfare)										
Multiple Employer (Retirement)										
Filing Status	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Deliquent Filing										
						1	1	1		

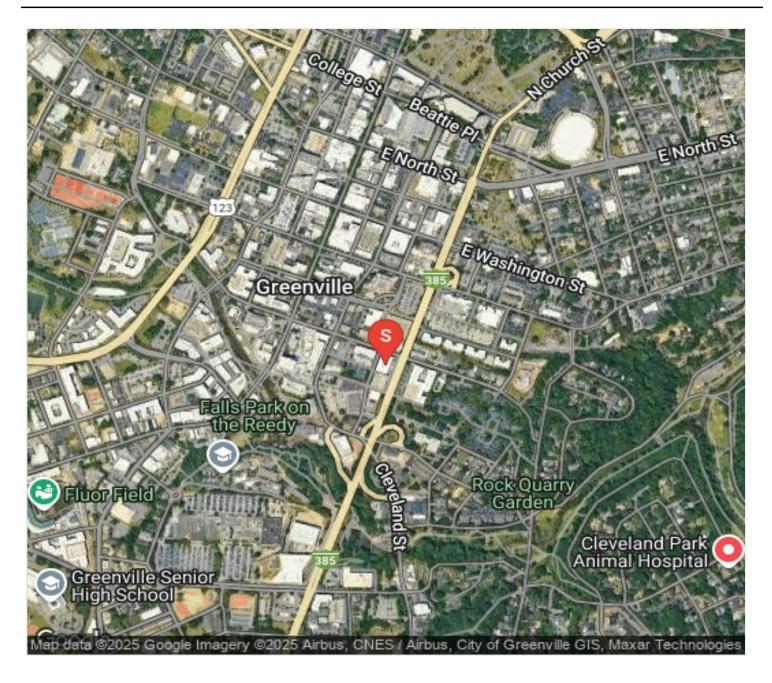
First Welfare Filing	
Final Welfare Filing	
Extension Filed	
First Retirement Filing	
Final Retirement Filing	
Q Location	GREENVILLE, GREENVILLE COUNTY - SOUTH CAROLINA

Top 5 Carriers for Greenville County - South Carolina

Rank	Carrier	Premium
1	BLUE CROSS BLUE SHIELD OF SOUTH CAROLINA	\$110,046,721
2	THE STANDARD	\$23,211,129
3	CIGNA	\$17,044,162
4	MET LIFE	\$15,670,436
5	UNUM	\$10,746,617

Top 5 Brokers for Greenville County - South Carolina

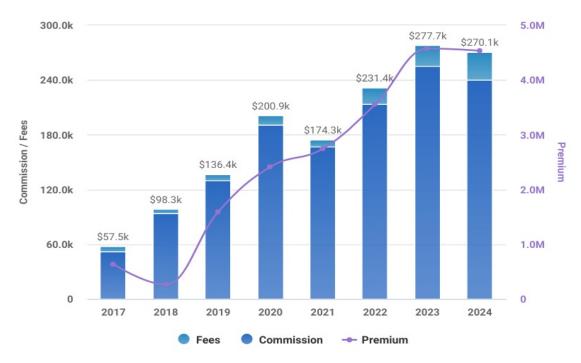
Rank	Broker	Commission	Fees
1	GALLAGHER	\$6,098,826	\$967,345
2	MARSH AND MCLENNAN AGENCY	\$1,635,592	\$217,684
3	LOCKTON COMPANIES	\$857,579	\$116,276
4	ASSUREDPARTNERS	\$827,132	\$81,323
5	USI INSURANCE SERVICES	\$596,566	\$122,528



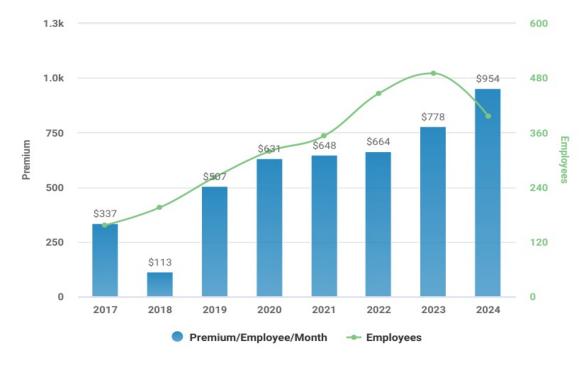
INSIGHTS

BENEFITS

Premium, Commission and Fees



Premium per Employee



Broker History

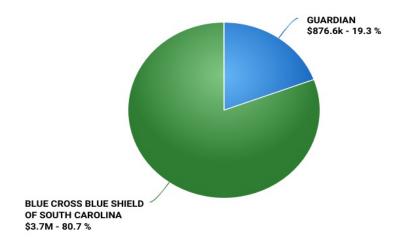


Name	Normalized Name	2024	2023	2022	2021	2020	2019	2018	2017
FORUM BENEFITS INC	ALERA GROUP	\$270,127	\$277,735	\$231,418	\$174,253	\$200,859		\$98,201	\$57,508
FORUM BENEFITS LLC	ALERA GROUP						\$136,213		
NATIONAL BENEFITS CENTER LLC	NATIONAL BENEFITS CENTER						\$156	\$140	

Current/Future Retirees

	2024	2023	2022	2021	2020	2019	2018	2017
Current Retirees	0	0	0	0	0	0	0	0
Future Retirees	0	0	0	0	0	0	0	0

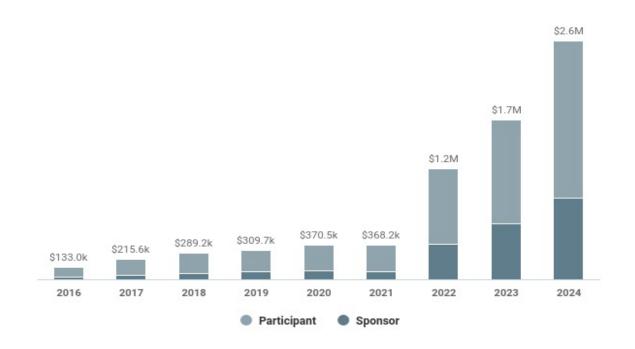
Spend By Carrier



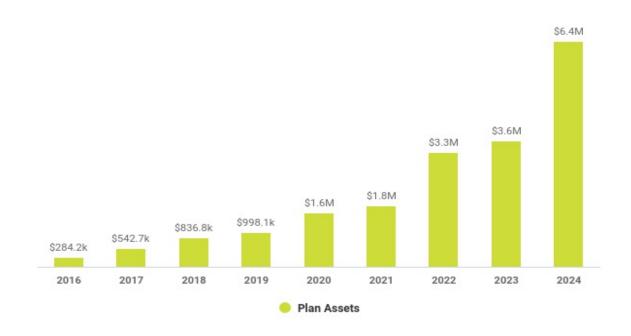
Name	Plan Types	Premium
BLUE CROSS BLUE SHIELD OF SOUTH CAROLINA	Health Prescription Drug	\$3,657,502
GUARDIAN	Dental Vision Life ST Disability LT Disability	\$876.630

RETIREMENT

Contributions



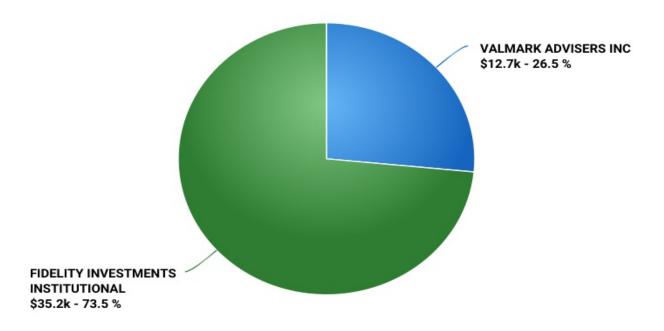
Plan Assets



Fidelity Bond

		Renewal	Beginning Assets	Ending Assets	Bond Amount	Ratio
10	TREATMENT CENTERS HOLDCO 401(K) PLAN	01/01/2024	\$3,604,224	\$6,430,914	\$700,000	19.42%

Spend by Retirement Service Provider



Service Provider Name	Service Types	Total Compensation
FIDELITY INVESTMENTS INSTITUTIONAL	Service Providers - Particpant Loan Processing, sub-transfer agency fees, recordkeeping fees, account maintenance fees	\$35,198

VALMARK ADVISERS INC

Advisers - Investment Advisory (Plan)

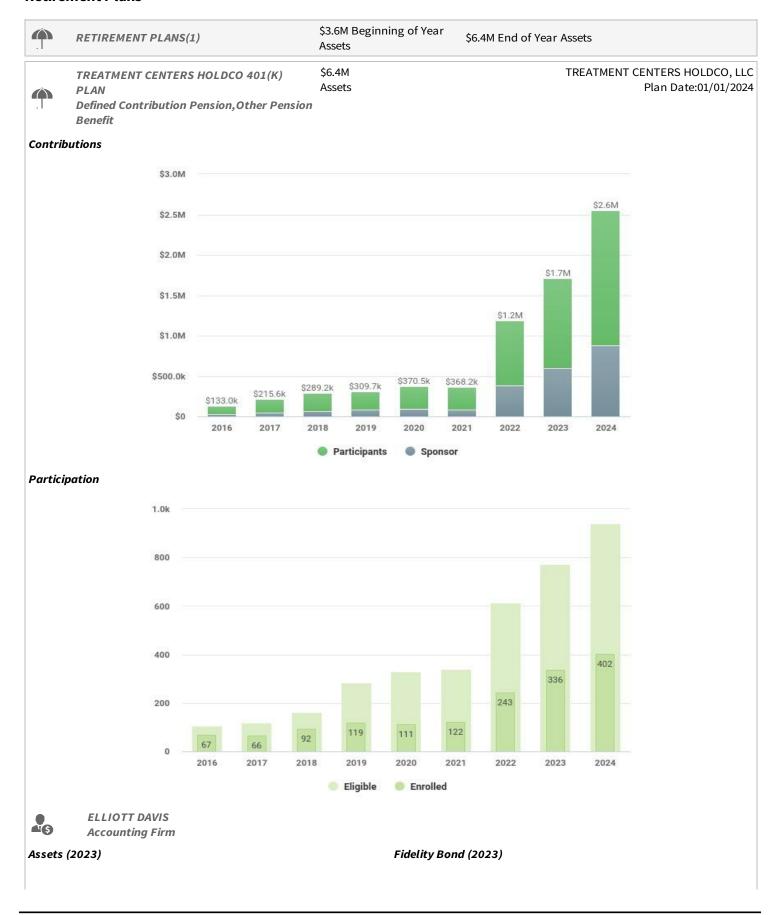
\$12,718

PLANS AND SERVICES

Benefits Plans

BENEFITS PLANS(2)	\$4.5M Premium \$270.1k Revenue	\$240.1k Commiss	ion \$30.0k Fees
Health Prescription Drug			TREATMENT CENTERS HOLDCO, LLC Renewal: 01/01/2024
Carrier	Premium	Participants	Premium/Participant/Month
BLUE CROSS BLUE SHIELD OF SOUTH CAROLINA BLUE CROSS BLUE SHIELD OF SOUTH CAROLINA	\$3.7M	396	\$770
Broker	Revenue	Commission	Fees
FORUM BENEFITS INC (GREENVILLE, SC)	\$124.1k	\$124.1k	\$0
ALERA GROUP - BENEFIT ADVISORS NETWORK	3.39%	3.39% (3.10%)	0.00%
_ Broker	Revenue	Commission	Fees
FORUM BENEFITS INC (GREENVILLE, SC)	\$124.1k	\$124.1k	\$0
ALERA GROUP - BENEFIT ADVISORS NETWORK	3.39%	3.39%	0.00%
Details			
fontract # 6616860			
ine of Business Health,Prescription drug			
Dental Vision Life Tempora	ry Disability 💃 Lor	ng Term Disability	TREATMENT CENTERS HOLDCO
Voluntary (All) Critical Illness/Cancer OOO			Renewal: 01/01/202
Carrier			
GUARDIAN LIFE INSURANCE COMPANY	Premium	Participants	Premium/Participant/Month
GUARDIAN	\$876.6k	414	\$176
	Revenue	Commission	Fees
	\$146.0k	\$115.9k	\$30.0k
	16.65%	13.22% (7.57%)	3.43%
Brokers	Revenue	Commission	Fees
FORUM BENEFITS INC (GREENVILLE, SC)	\$115.9k	\$115.9k	\$0
ALERA GROUP - BENEFIT ADVISORS NETWORK	13.22%	13.22%	0.00%
ALERA GROUP INC (, SC)	Revenue	Commission	Fees
_ ::=::::::::::::::::::::::::::::::::::		4.0	\$30.0k
ALERA GROUP - BENEFIT ADVISORS NETWORK	\$30.0k	<i>\$0</i>	230.0K
ALERA GROUP - BENEFIT ADVISORS NETWORK	\$30.0k 3.43%	\$0 0.00%	3.43%
ALERA GROUP - BENEFIT ADVISORS NETWORK Details	•	, -	•
Details	•	, -	•
Details Contract # 00507907	3.43%	0.00%	•

Retirement Plans



Beginning Ending	\$3,604,224 \$6,430,914 \$700,000(19.42%)	
Average participant balance Plan Descriptions	\$15,997	
3H Member(s) of a controlled group 2F ERISA section 404(c) Plan 2J Code section 401(k) feature 2T Default investment account 3D Pre-approved pension plan	2E Profit-sharing 2G Total participant-directed Plan 2K Stock bonusCode section 401(m) 3B Self-Employed individuals	
Advisors	Service Providers	
VALMARK ADVISERS INC Other Plan Details	\$12,718 FIDELITY INVESTMENTS INSTITUTIONAL	\$35,198
Participant Loans	\$144,117 Retirees Current/Future	0/77

Benefits Services



BENEFITS SERVICES

This company has not reported any Benefits Services

Retirement Services

00	RETIREMENT SERVICES(2)		\$47.9k Direct \$0 Ind Compensation		rect Compensation	
00	FIDELITY INVESTMENTS INSTITUTIONAL Retirement - Service Providers		\$35.2k Total Compensation		TREATMENT CENTERS HOLDCO, LLC TREATMENT CENTERS HOLDCO 401(K) PLAN	
EIN		042647786		Direct Compensat	ion \$35,198	
Service	Description	Particpant Loan Pro transfer agency fees,recordkeeping maintenance fees	G,	Indirect Compens	ation \$0	
				Total Compensati	on \$35,198	
00	VALMARK ADVISERS INC Retirement - Advisers		\$12.7k Total Compensation		TREATMENT CENTERS HOLDCO, LLC TREATMENT CENTERS HOLDCO 401(K) PLAN	
EIN		311509466		Direct Compensat	ion \$12,718	
Service	Description	Investment Advisor	y (Plan)	Indirect Compens	ation \$0	
				Total Compensati	on \$12,718	

INFLUENCERS



Benefits Brokers

ALERA GROUP - BENEFIT ADVISORS NETWORK	100.00%	\$270,127
FORUM BENEFITS INC ALERA GROUP - BENEFIT ADVISORS NETWORK	1122 S MAIN ST STE B GREENVILLE, SC	\$240,083
ALERA GROUP INC ALERA GROUP - BENEFIT ADVISORS NETWORK	, SC	\$30,044

Total for TREATMENT CENTERS HOLDCO LLC - 2024 Benefits Broker Commission and Fees

\$270,127



Retirement Service Providers

In-Force revenue of \$35,198 FIDELITY INVESTMENTS INSTITUTIONAL

Service Providers

In-Force revenue of \$12,718 VALMARK ADVISERS INC

Advisers



Accounting Firms

ELLIOTT DAVIS

ELLIOTT DAVIS

CONTACTS

Jonathan Foust Form 5500 Signatory	TREATMENT CENTERS HOLDCO, LLC GREENVILLE - SC	
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Hollie Bates Executive Officer	CROSSROADS TREATMENT CENTER SENECA - SC	(800) 805-6989