PROFILE

SOUND INPATIENT PHYSICIANS INC

1498 PACIFIC AVE STE 400

TACOMA

WA 98402

+1 (253) 682-6059

http://soundphysicians.com

MSID M84000017540748

EIN 203050924

f http://www.facebook.com/soundphysicians

in http://www.linkedin.com/company/sound-physicians

https://twitter.com/soundphysicians

NAICS codes

621111 - Offices of Physicians (except Mental Health Specialists)

622110 - General Medical and Surgical Hospitals

541611 - Administrative Management and General Management

Consulting Services

541618 - Other Management Consulting Services

621999 - All Other Miscellaneous Ambulatory Health Care Services

621491 - HMO Medical Centers

238210 - Electrical Contractors and Other Wiring Installation

Contractors

62 - Health Care and Social Assistance

621493 - Freestanding Ambulatory Surgical and Emergency Centers

54 - Professional, Scientific, and Technical Services

and 4 others

Improving quality and lowering the cost of care for patients in the communities we serve.

1,000 - 4,999 employees				\$ 200M - 1B revenue					
	2024	2023	2022	2021	2020	2019	2018	2017	2016
Eligible Employees	4,298	4,556	4,312	3,972	4,002	3,709	2,773	2,255	1,230



ALLIANT INSURANCE SERVICES INC ALLIANT INSURANCE SERVICES Benefits Broker USI SO USI IN

USI SOUTHWEST - HOUSTON USI INSURANCE SERVICES CL Broker



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USI SOUTHWEST - HOUSTON USI INSURANCE SERVICES CL Broker



USI CONSULTING GROUP, INC. *Retirement Advisor/Consultant*



WORTHY AND COMPANY
Accounting Firm

Retirement Advisor/Cor	isultarit				ACC	Lounting Fin	11			
Key Indicators	S. N		1							
KPI's	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega Wrap	M		M	M	M	M	M	M	M	
Collectively Bargained										
Self-funded Employee Benefits	\$	\$	\$	\$						
Filing with no Schedule A	0	0	0	0						
Multiple Employer (Welfare)										
Multiple Employer (Retirement)										
Filing Status	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015

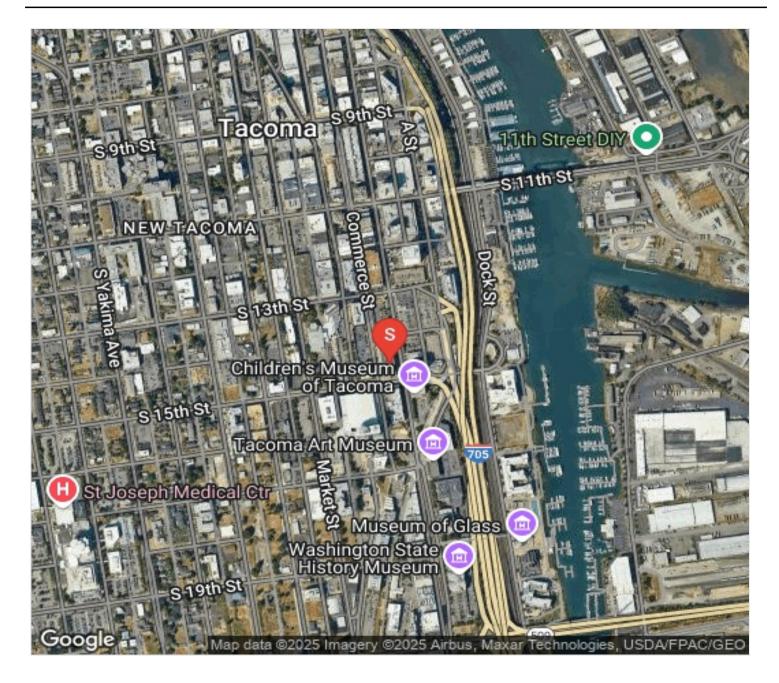
Deliquent Filing					
First Welfare Filing	1	1	1	1	
Final Welfare Filing					
Extension Filed				•ा	•1
First Retirement Filing					
Final Retirement Filing					
Q Location	TACOMA, PIEI	RCE COUN	ITY - WASHI	NGTON	

Top 5 Carriers for Pierce County - Washington

Rank	Carrier	Premium
1	PREMERA BLUE CROSS	\$62,065,239
2	KAISER	\$29,589,824
3	CAMBIA HEALTH SOLUTIONS	\$13,186,262
4	SUN LIFE FINANCIAL	\$12,841,821
5	AETNA	\$12,025,905

Top 5 Brokers for Pierce County - Washington

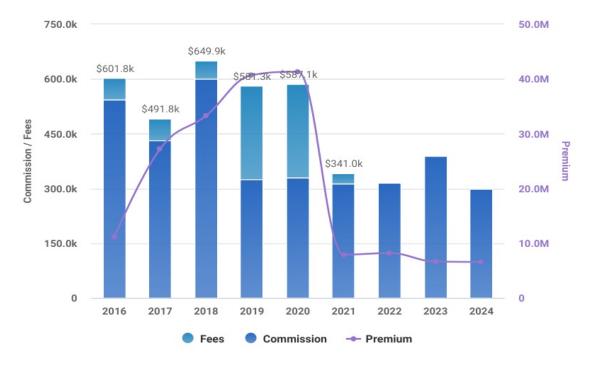
Rank	Broker	Commission	Fees
1	ALERA GROUP	\$916,368	\$81,382
2	BROWN AND BROWN	\$704,458	\$26,800
3	USI INSURANCE SERVICES	\$695,367	\$31,357
4	MARSH AND MCLENNAN AGENCY	\$646,049	\$45,770
5	EOI SERVICES COMPANY	\$680,866	\$0



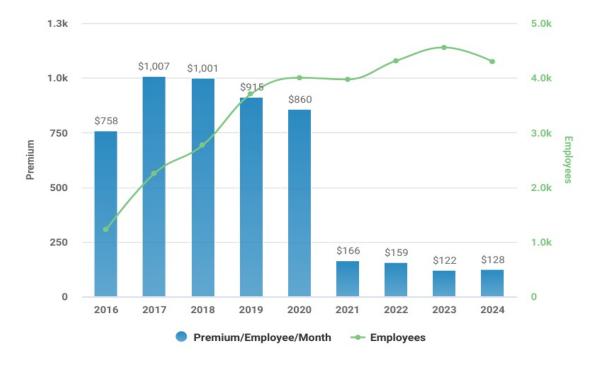
INSIGHTS

BENEFITS

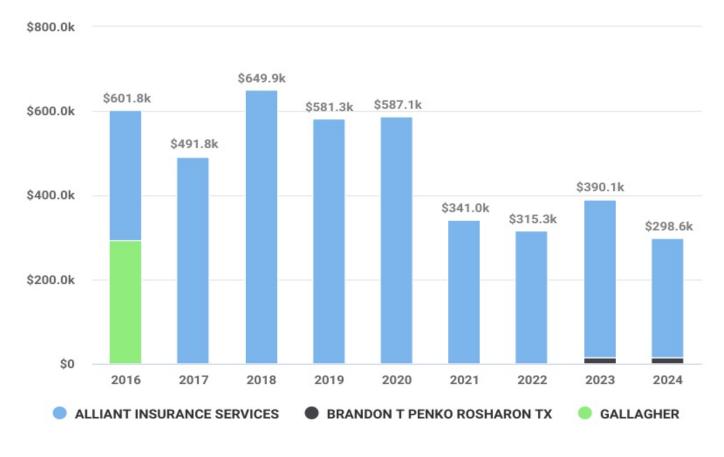
Premium, Commission and Fees



Premium per Employee



Broker History

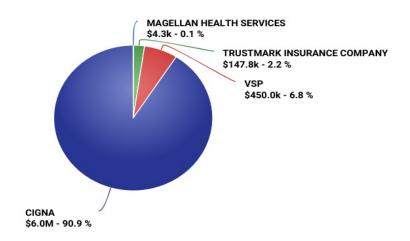


Name	Normalized Name	2024	2023	2022	2021	2020	2019	2018	2017	2016
ALLIANT INSURANCE SERVICES INC	ALLIANT INSURANCE SERVICES	\$283,946	\$375,124	\$315,294	\$340,978	\$587,096	\$581,312		\$491,798	\$308,002
BRANDON T PENKO	BRANDON T PENKO ROSHARON TX	\$14,687	\$14,963							
ALLIANT INSURANCE SERVICE INC	ALLIANT INSURANCE SERVICES							\$649,941		
MICHAEL DAVIS	GALLAGHER									\$293,796

Current/Future Retirees

	2024	2023	2022	2021	2020	2019	2018	2017	2016
Current Retirees	0	0	0	74	0	0	0	0	0
Future Retirees	0	0	0	134	0	0	0	0	0

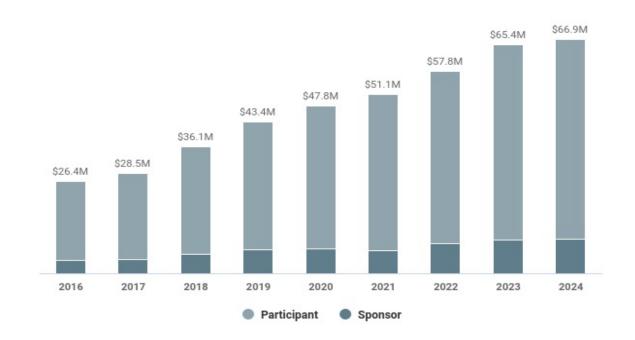
Spend By Carrier



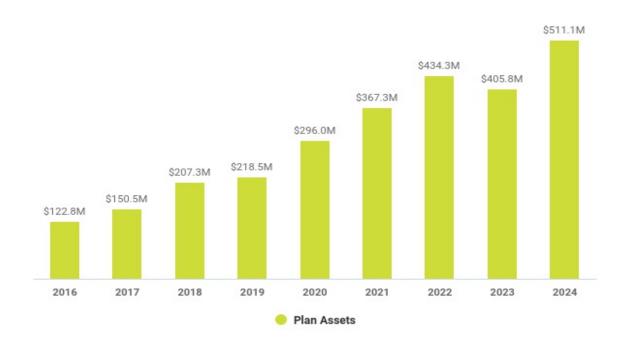
Name	Plan Types	Premium
CIGNA	Life ST Disability LT Disability	\$5,998,347
VSP	Vision	\$449,974
TRUSTMARK INSURANCE COMPANY	Life	\$147,820
MAGELLAN HEALTH SERVICES		\$4,284

RETIREMENT

Contributions



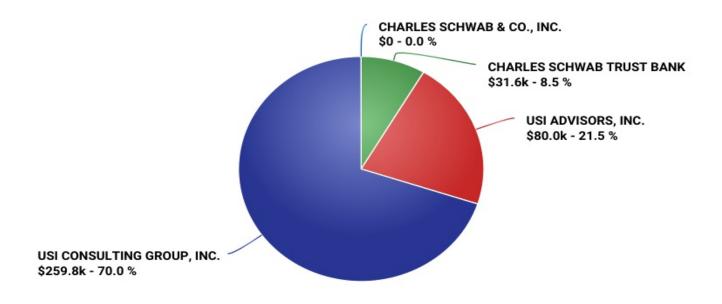
Plan Assets



Fidelity Bond

	Renewal	Beginning Assets	Ending Assets	Bond Amount	Ratio
SOUND PHYSICIANS 401(K) PLAN	01/01/2024	\$405,824,036	\$511,117,636	\$500,000	0.12%

Spend by Retirement Service Provider



Service Provider Name	Service Types	Total Compensation
USI CONSULTING GROUP, INC.	Advisers - Recordkeeping and information mgt, Investment Advisory (Participants), Investment Advisory (Plan), Participant Loan Processing, Direct Payment from the plan, investment management fees paid directly by plan	\$259,848

USI ADVISORS, INC.	$Service\ Providers-Investment\ Advisory\ (Participants), investment\ management\ fees\ paid\ directly\ by\ plan$	\$79,972
CHARLES SCHWAB TRUST BANK	Service Providers - Custodial (other than securities), Custodial (Securities), investment management fees paid indirectly by plan, shareholder servicing fees, float revenue	\$31,598
CHARLES SCHWAB & CO., INC.	Service Providers - Custodial(other than securities), Custodial(Securities), shareholder servicing fees	\$0

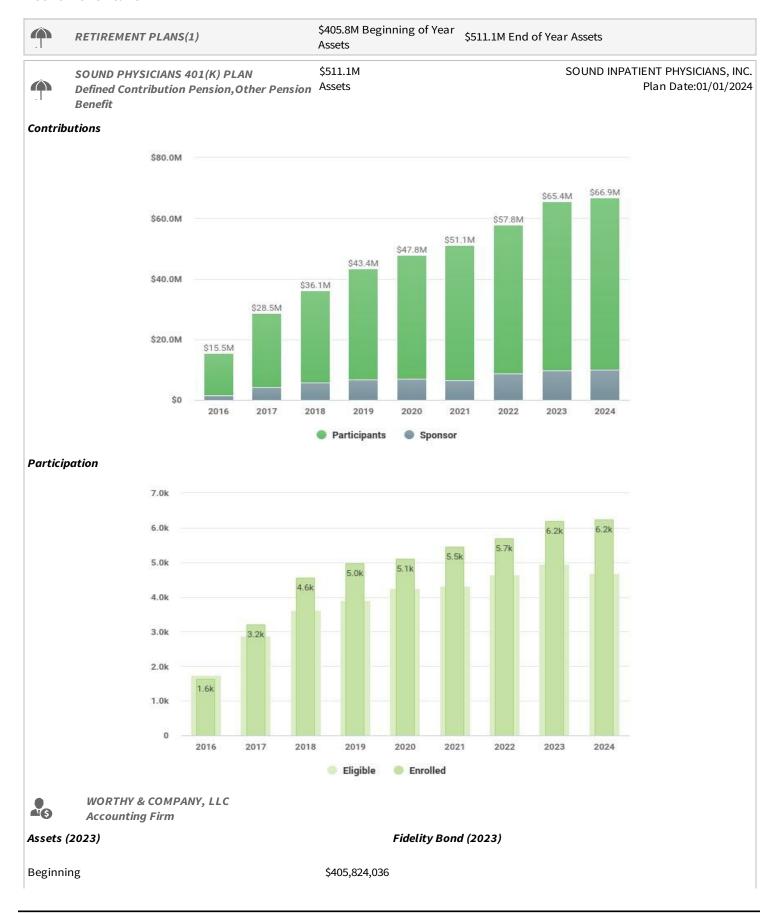
PLANS AND SERVICES

Benefits Plans

*	BENEFITS PLANS(4)	\$6.6M Prem \$298.6k Rev		3.6k Commissio	n \$0 Fees
•	Life Temporary Disability Long Ter	m Disability	Wellness/EAP	OO Other	SOUND INPATIENT PHYSICIANS, INC Renewal: 01/01/2024
A	Carrier LIFE INSURANCE COMPANY OF NORTH AMERICA CIGNA	Premium \$6.0M	Participo 4,298	ants	Premium/Participant/Month \$116
	Broker ALLIANT INSURANCE SERVICES INC (SEATTLE, WA) ALLIANT INSURANCE SERVICES	Revenue \$262.0k 4.37%	Commis. \$262.0k 4.37% (3	٨	Fees \$0 0.00%
	Broker ALLIANT INSURANCE SERVICES INC (SEATTLE, WA) ALLIANT INSURANCE SERVICES	Revenue \$262.0k 4.37%	Commis. \$262.0k 4.37%	sion	Fees \$0 0.00%
Line	ils ract# FLK961110	ability,Long-t	erm disability,EMPLC	DYEE ASSISTAN	CE PROGRAM,ACCIDENTAL DEATH
00	r Vision				SOUND INPATIENT PHYSICIANS, INC Renewal: 01/01/2024
A	Carrier VISION SERVICE PLAN VSP	Premium \$450.0k	Participo 3,153	ants	Premium/Participant/Month \$12
	Broker ALLIANT INSURANCE SERVICES INC (PASADENA, CA) ALLIANT INSURANCE SERVICES	Revenue \$5.9k 1.32%	Commis. \$5.9k 1.32% (2	~ .	Fees \$0 0.00%
	Broker ALLIANT INSURANCE SERVICES INC (PASADENA, CA) ALLIANT INSURANCE SERVICES	Revenue \$5.9k 1.32%	Commis. \$5.9k 1.32%	sion	Fees \$0 0.00%
	ils ract # 30005575 of Business Vision				
•	Life OO Long Term Care OO Other				SOUND INPATIENT PHYSICIANS, INC Renewal: 01/01/2024
	Carrier TRUSTMARK INSURANCE COMPANY TRUSTMARK INSURANCE COMPANY	Premium \$147.8k	Participo 116	ants	Premium/Participant/Month \$106
		Revenue \$30.7k 20.79%	Commis: \$30.7k 20.79% (~ .	Fees \$0 0.00%
	Brokers ALLIANT INSURANCE SERVICES INC (SEATTLE,	Revenue \$16.0k	Commis. \$16.0k	sion	Fees \$0

WA) ALLIANT INSU	RANCE SERVICES	10.85%	10.85%	0.00%
	ENKO (ROSHARON, TX) ENKO ROSHARON TX	Revenue \$14.7k 9.94%	Commission \$14.7k 9.94%	Fees \$0 0.00%
Details Contract # Line of Business	741700000 Life Insurance,LONG TE	RM CARE		
OO Wellness/EAP	OO Other			SOUND INPATIENT PHYSICIANS, INC Renewal: 01/01/2024
Carrier MAGELLAN HE MAGELLAN HE	FALTHCARE FALTH SERVICES	Premium \$4.3k	Participants 204	Premium/Participant/Month \$2
		Revenue \$0 0.00%	Commission \$0 0.00% (8.00%)	Fees \$0 0.00%
Details Contract # Line of Business	SIPI0001 EMPLOYEE ASSISTANCE	PROGRAM	,	

Retirement Plans



Ending	\$511,117,636 \$500,000(0.12%)	16
Average participant balance	\$82,067	
Plan Descriptions		
2E Profit-sharing	2J Code section 401(k) feature	
2K Stock bonusCode section 401(m)	2T Default investment account	
3D Pre-approved pension plan		
Advisors	Service Providers	
USI CONSULTING GROUP, INC.	\$259,848 USI ADVISORS, INC.	\$79,972
	CHARLES SCHWAB TRUST BANK	\$31,598
	CHARLES SCHWAB & CO., INC.	\$0
Other Plan Details		
Participant Loans	\$2,865,669 Retirees Current/Future	0/2,385

Benefits Services



BENEFITS SERVICES

This company has not reported any Benefits Services

Retirement Services

00	RETIREMENT SERVIC	ES(4)	\$339.8k Direc Compensatio		\$31.6k Indirect Compensation	
00	USI CONSULTING GRO Retirement - Advisers		\$259.8k Total Compensatio			SOUND INPATIENT PHYSICIANS, INC. SOUND PHYSICIANS 401(K) PLAN
EIN		061053228		Direct Comp	ensation	\$259,848
Service	Description	Recordkeeping an mgt,Investment Ar (Participants),Inve (Plan),Particpant Processing,Direct the plan,investme fees paid directly	dvisory estment Advisory Loan Payment from nt management		npensation	\$0
				Total Comp	ensation	\$259,848
00	USI ADVISORS, INC. Retirement - Service I	Providers	\$80.0k Total (Compensatio	n	SOUND INPATIENT PHYSICIANS, INC. SOUND PHYSICIANS 401(K) PLAN
EIN		061397347		Direct Comp	ensation	\$79,972
Service	Description	Investment Adviso (Participants),inve management fees plan	estment	Indirect Con	npensation	\$0
				Total Comp	ensation	\$79,972
00	CHARLES SCHWAB TR Retirement - Service I		\$31.6k Total (Compensatio	n	SOUND INPATIENT PHYSICIANS, INC. SOUND PHYSICIANS 401(K) PLAN
EIN		823967259		Direct	Compensation	\$0
Service	Description	Custodial(other than securities),Custodial(management fees pa plan,shareholder ser revenue	Securities),investid indirectly by		t Compensation	\$31,598
				Total (Compensation	\$31,598
00	CHARLES SCHWAB & Retirement - Service I	•	\$0 Total Com	pensation		SOUND INPATIENT PHYSICIANS, INC. SOUND PHYSICIANS 401(K) PLAN
EIN		941737782		Direct	Compensation	\$0
Service	Description	Custodial(other than securities),Custodial(servicing fees			ct Compensation	\$0
				Total	Compensation	\$0

INFLUENCERS



Benefits Brokers

ALLIANT INSURANCE SERVICES	95.08%	\$283,946
ALLIANT INSURANCE SERVICES INC ALLIANT INSURANCE SERVICES	1420 5TH AVE STE 1500 SEATTLE, WA	\$261,957
ALLIANT INSURANCE SERVICES INC ALLIANT INSURANCE SERVICES	1420 5TH AVE FL 15 SEATTLE, WA	\$16,042
ALLIANT INSURANCE SERVICES INC ALLIANT INSURANCE SERVICES	PO BOX 8299 PASADENA, CA	\$5,947
BRANDON T PENKO ROSHARON TX	4.92%	\$14,687
BRANDON T PENKO BRANDON T PENKO ROSHARON TX	4927 MAGNOLIA BEND DR ROSHARON, TX	\$14,687

Total for SOUND INPATIENT PHYSICIANS INC - 2024 Benefits Broker Commission and Fees

\$298,633



CL Brokers

Latest Policy Date: 09/30/2024 **HOUSTON USI SOUTHWEST HOUSTON** TX USI INSURANCE SERVICES

Retirement Service Providers

USI CONSULTING GROUP, INC. Advisers	95 GLASTONBURY BOULEVARD GLASTONBURY CT 06033	In-Force revenue of \$259,848
USI ADVISORS, INC. Service Providers	95 GLASTONBURY BOULEVARD GLASTONBURY CT 06033	In-Force revenue of \$79,972
CHARLES SCHWAB TRUST BANK Service Providers	211 MAIN STREET SEATTLE WA 94105	In-Force revenue of \$31,598
CHARLES SCHWAB & CO., INC. Service Providers	211 MAIN STREET SAN FRAMCISCO CA 94105	



Accounting Firms

WORTHY AND COMPANY

WORTHY AND COMPANY

CONTACTS

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