

THIRD-PARTY ADMINISTRATOR AGREEMENT

Professional fillable business template

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Replace this area

IMPORTANT: This is a general educational starting-point template, not legal advice. Laws, roles, licensing duties, and required terms vary. Have a licensed attorney review and adapt this agreement before anyone signs it or relies on it.

Agreement Details

Effective Date

Jurisdiction(s)

Client / Plan Sponsor

Administrator

Program / Plan

Initial Term

Delegated Services

Authority Limits and Required Approvals

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Operations and Controls

Records, Reports, and Retention

Funds / Account Controls

Approved Subcontractors

Privacy, Security, and Incident Requirements

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Commercial and Risk Terms

Fees and Expenses

Service Levels and Escalations

Insurance / Bonds / Continuity

Attorney-Reviewed Indemnity and Liability Terms

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Termination and Signatures

Without-Cause Notice

Cure Period

Transition Assistance and Record Delivery

Governing Law

Venue / Dispute Process

Client Signer / Title

Administrator Signer / Title

Client Signature / Date

Administrator Signature / Date