



Fwd: FW: Hidalgo County Document Authorization - Signatures Needed

1 message

Betsy Roque <betsy.roque@co.hidalgo.tx.us>
To: "velasquez, yolanda" <yolanda.velasquez@co.hidalgo.tx.us>
Cc: "trevino, dina" <dina.trevino@co.hidalgo.tx.us>, "salazar, martha" <martha.salazar@co.hidalgo.tx.us>

Thu, Jun 10, 2021 at 2:56 PM

Email 2 of 2.

br

**Thank you,
Betsy Roque**

Contracts Management Division Manager
Purchasing Department | County of Hidalgo
2812 S. Business Highway 281 | Edinburg, TX 78539
(956) 318-2626 ext. 4858 | betsy.roque@co.hidalgo.tx.us
"By failing to prepare, you are preparing to fail." -Benjamin Franklin

----- Forwarded message -----

From: **Josephine Ramirez** <josephine.ramirez@da.co.hidalgo.tx.us>
Date: Wed, Jun 9, 2021 at 1:57 PM
Subject: Re: FW: Hidalgo County Document Authorization - Signatures Needed
To: Martha Salazar <martha.salazar@co.hidalgo.tx.us>
Cc: garza, victor <victor.garza@da.co.hidalgo.tx.us>, vina, robert <robert.vina@da.co.hidalgo.tx.us>, Amanda Austin <amanda.austin@da.co.hidalgo.tx.us>, trevino, dina <dina.trevino@co.hidalgo.tx.us>, roque, betsy <betsy.roque@co.hidalgo.tx.us>

Our office has reviewed the attached NBS agreements and approves as to form.

Josephine Ramirez Solis

Assistant Criminal District Attorney

Chief - Civil Division

Office of Criminal District Attorney

Hidalgo County, Texas

100 E. Cano

Edinburg, TX 78539

(956) 292-7609 ext. 8186

(956) 292-7619 FAX

josephine.ramirez@da.co.hidalgo.tx.us

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On Wed, Jun 9, 2021 at 10:38 AM Martha Salazar <martha.salazar@co.hidalgo.tx.us> wrote:

Counselors:
I had a call from Messrs. Walter and Anthony Reyna yesterday. They are looking for the signatures on the documents attached. One of the documents has been under your review for some time. However, both gentlemen informed me that due to the delay in signatures, county employees desiring to start a deferred compensation account cannot do so due to this delay. They are offering the explanations enclosed. Please advise asap.

Yours truly,
Martha L. Salazar
Hidalgo County Purchasing Director
2802 S. Business Hwy 281 | Edinburg, TX 78539

----- Forwarded message -----

From: **Anthony Reyna** <anthony@walterreyna.com>
Date: Tue, Jun 8, 2021 at 4:00 PM
Subject: FW: Hidalgo County Document Authorization - Signatures Needed
To: Martha.salazar@co.hidalgo.tx.us <Martha.salazar@co.hidalgo.tx.us>
Cc: Walter Reyna <walter@walterreyna.com>

Marty,

Below is an explanation of each of the 3 forms from NBS, the new 3rd party administrator that took over for Simpkins and Associates. Let me know if anything else is needed, or more explanation needed.

I do know Misty had been in contact with legal back in February, but I don't know what happened since then. I can tell you that we have a back log of employees that want to participate and have filled out forms, but cannot until these forms are signed. They do call my office periodically to get an update on the status of things.

As for the other form we need to take before the commissioners, I will be able to get that to you in the next week or two. I want it drafted correctly.

Thanks,

Anthony

J. Anthony Reyna | Investment Advisory Rep

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A Registered Investment Advisor

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Learn more at www.walterreyna.com

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From: Misty Pendleton <MistyP@nbsbenefits.com>
Sent: Tuesday, June 8, 2021 2:02 PM
To: Anthony Reyna <anthony@walterreyna.com>
Subject: Hidalgo County Document Authorization - Signatures Needed

Hello Anthony,

These documents were drafted based on previous plan documents, with the exception of the Authorization Agreement Pre-Arranged Payment document. I included this payment document as requested by my processing team to help expedite payroll processing. It will allow NBS to directly withdraw funds once we receive the payroll detail.

The Document Authorization is an outline of the plan design and how the plan should run. This is what we would follow as a guideline to draft the plan documents. Once this document is signed and returned, we will have the new plan documents drafted and sent to the authorized signer to be signed. All plans under our care need to have updated NBS plan documents so we can ensure current IRS regulations are being followed.

The Service and Fee Agreement explains the fees and services we provide as a Third Party Administrator and the responsibilities of the employer.

Please let me know if you have any questions.

Thank you,

Misty Pendleton

Relationship Manager, Non-ERISA



Comprehensive Benefit and Retirement Plan Administration

HSA FSA HRA 401(k) 403(b) 457 Fiduciary COBRA

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