

3a Plan administrator's name and address <input checked="" type="checkbox"/> Same as Plan Sponsor	3b Administrator's EIN	
	3c Administrator's telephone number	
4 If the name and/or EIN of the plan sponsor or the plan name has changed since the last return/report filed for this plan, enter the plan sponsor's name, EIN, the plan name and the plan number from the last return/report: a Sponsor's name c Plan Name	4b EIN	
	4d PN	
5 Total number of participants at the beginning of the plan year	5	353
6 Number of participants as of the end of the plan year unless otherwise stated (welfare plans complete only lines 6a(1) , 6a(2) , 6b , 6c , and 6d). a(1) Total number of active participants at the beginning of the plan year a(2) Total number of active participants at the end of the plan year b Retired or separated participants receiving benefits..... c Other retired or separated participants entitled to future benefits d Subtotal. Add lines 6a(2) , 6b , and 6c e Deceased participants whose beneficiaries are receiving or are entitled to receive benefits. f Total. Add lines 6d and 6e g(1) Number of participants with account balances as of the beginning of the plan year (only defined contribution plans complete this item) g(2) Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item) h Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested.....	6a(1)	353
	6a(2)	525
	6b	
	6c	
	6d	525
	6e	
	6f	525
	6g(1)	
6g(2)		
6h		
7 Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item)	7	

8a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions:

b If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristics Codes in the instructions:
4A 4B 4D 4E 4F 4H 4Q

9a Plan funding arrangement (check all that apply) (1) <input checked="" type="checkbox"/> Insurance (2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts (3) <input type="checkbox"/> Trust (4) <input type="checkbox"/> General assets of the sponsor	9b Plan benefit arrangement (check all that apply) (1) <input checked="" type="checkbox"/> Insurance (2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts (3) <input type="checkbox"/> Trust (4) <input type="checkbox"/> General assets of the sponsor
---	---

10 Check all applicable boxes in 10a and 10b to indicate which schedules are attached, and, where indicated, enter the number attached. (See instructions)

a Pension Schedules (1) <input type="checkbox"/> R (Retirement Plan Information) (2) <input type="checkbox"/> MB (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary (3) <input type="checkbox"/> SB (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary (4) <input type="checkbox"/> DCG (Individual Plan Information) – Number Attached _____ (5) <input type="checkbox"/> MEP (Multiple-Employer Retirement Plan Information)	b General Schedules (1) <input type="checkbox"/> H (Financial Information) (2) <input type="checkbox"/> I (Financial Information – Small Plan) (3) <input checked="" type="checkbox"/> A (Insurance Information) – Number Attached <u>2</u> (4) <input type="checkbox"/> C (Service Provider Information) (5) <input type="checkbox"/> D (DFE/Participating Plan Information) (6) <input type="checkbox"/> G (Financial Transaction Schedules)
---	---

Part III Form M-1 Compliance Information (to be completed by welfare benefit plans)

11a If the plan provides welfare benefits, was the plan subject to the Form M-1 filing requirements during the plan year? (See instructions and 29 CFR 2520.101-2.) Yes No

If "Yes" is checked, complete lines 11b and 11c.

11b Is the plan currently in compliance with the Form M-1 filing requirements? (See instructions and 29 CFR 2520.101-2.) Yes No

11c Enter the Receipt Confirmation Code for the 2024 Form M-1 annual report. If the plan was not required to file the 2024 Form M-1 annual report, enter the Receipt Confirmation Code for the most recent Form M-1 that was required to be filed under the Form M-1 filing requirements. (Failure to enter a valid Receipt Confirmation Code will subject the Form 5500 filing to rejection as incomplete.)

Receipt Confirmation Code _____

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

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(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

Part II Investment and Annuity Contract Information
 Where individual contracts are provided, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

4 Current value of plan's interest under this contract in the general account at year end	4	
5 Current value of plan's interest under this contract in separate accounts at year end.....	5	

6 Contracts With Allocated Funds:

a State the basis of premium rates ▶

b Premiums paid to carrier **6b**

c Premiums due but unpaid at the end of the year **6c**

d If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, enter amount. **6d**
 Specify nature of costs ▶

e Type of contract: (1) individual policies (2) group deferred annuity
 (3) other (specify) ▶

f If contract purchased, in whole or in part, to distribute benefits from a terminating plan, check here ▶

7 Contracts With Unallocated Funds (Do not include portions of these contracts maintained in separate accounts)

- a** Type of contract: (1) deposit administration (2) immediate participation guarantee
 (3) guaranteed investment (4) other ▶

b Balance at the end of the previous year			7b	
c Additions: (1) Contributions deposited during the year	7c(1)			
	7c(2)			
	7c(3)			
	7c(4)			
	7c(5)			
(6) Total additions			7c(6)	
d Total of balance and additions (add lines 7b and 7c(6))			7d	
e Deductions:				
	7e(1)			
	7e(2)			
	7e(3)			
	7e(4)			
(5) Total deductions			7e(5)	
f Balance at the end of the current year (subtract line 7e(5) from line 7d).....			7f	

Part III Welfare Benefit Contract Information
 If more than one contract covers the same group of employees of the same employer(s) or members of the same employee organizations(s), the information may be combined for reporting purposes if such contracts are experience-rated as a unit. Where contracts cover individual employees, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

8 Benefit and contract type (check all applicable boxes)

- a** Health (other than dental or vision)
- b** Dental
- c** Vision
- d** Life insurance
- e** Temporary disability (accident and sickness)
- f** Long-term disability
- g** Supplemental unemployment
- h** Prescription drug
- i** Stop loss (large deductible)
- j** HMO contract
- k** PPO contract
- l** Indemnity contract
- m** Other (specify) ▶

9 Experience-rated contracts:

a	Premiums: (1) Amount received	9a(1)	
	(2) Increase (decrease) in amount due but unpaid	9a(2)	
	(3) Increase (decrease) in unearned premium reserve	9a(3)	
	(4) Earned ((1) + (2) - (3))		9a(4)
b	Benefit charges (1) Claims paid	9b(1)	
	(2) Increase (decrease) in claim reserves	9b(2)	
	(3) Incurred claims (add (1) and (2))		9b(3)
	(4) Claims charged		9b(4)
c	Remainder of premium: (1) Retention charges (on an accrual basis) --		
	(A) Commissions	9c(1)(A)	
	(B) Administrative service or other fees	9c(1)(B)	
	(C) Other specific acquisition costs	9c(1)(C)	
	(D) Other expenses	9c(1)(D)	
	(E) Taxes	9c(1)(E)	
	(F) Charges for risks or other contingencies	9c(1)(F)	
	(G) Other retention charges	9c(1)(G)	
	(H) Total retention		9c(1)(H)
	(2) Dividends or retroactive rate refunds. (These amounts were <input type="checkbox"/> paid in cash, or <input type="checkbox"/> credited.)		9c(2)
d	Status of policyholder reserves at end of year: (1) Amount held to provide benefits after retirement		9d(1)
	(2) Claim reserves		9d(2)
	(3) Other reserves		9d(3)
e	Dividends or retroactive rate refunds due. (Do not include amount entered in line 9c(2).)		9e

10 Nonexperience-rated contracts:

a	Total premiums or subscription charges paid to carrier	10a	3616042
b	If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, other than reported in Part I, line 2 above, report amount. Specify nature of costs.	10b	

Part IV Provision of Information

11 Did the insurance company fail to provide any information necessary to complete Schedule A? Yes No

12 If the answer to line 11 is "Yes," specify the information not provided. ▶

<p>SCHEDULE A (Form 5500)</p> <p>Department of the Treasury Internal Revenue Service</p> <hr/> <p>Department of Labor Employee Benefits Security Administration</p> <hr/> <p>Pension Benefit Guaranty Corporation</p>	<p>Insurance Information</p> <p>This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA).</p> <p>▶ File as an attachment to Form 5500.</p> <p>▶ Insurance companies are required to provide the information pursuant to ERISA section 103(a)(2).</p>	<p>OMB No. 1210-0110</p> <hr/> <p>2024</p> <hr/> <p>This Form is Open to Public Inspection</p>
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For calendar plan year 2024 or fiscal plan year beginning **01/01/2024** and ending **12/31/2024**

<p>A Name of plan FRIENDSHIP VILLAGE OF TEMPE EMPLOYEE CAFETERIA PLAN</p>	<p>B Three-digit plan number (PN) ▶</p>	<p>505</p>
<p>C Plan sponsor's name as shown on line 2a of Form 5500 TEMPE LIFE CARE VILLAGE, INC</p>	<p>D Employer Identification Number (EIN) 86-0335417</p>	

Part I Information Concerning Insurance Contract Coverage, Fees, and Commissions Provide information for each contract on a separate Schedule A. Individual contracts grouped as a unit in Parts II and III can be reported on a single Schedule A.

1 Coverage Information:

(a) Name of insurance carrier
GUARDIAN

(b) EIN	(c) NAIC code	(d) Contract or identification number	(e) Approximate number of persons covered at end of policy or contract year	Policy or contract year	
				(f) From	(g) To
13-5123390	64246	00462838	458	01/01/2024	12/31/2024

2 Insurance fee and commission information. Enter the total fees and total commissions paid. List in line 3 the agents, brokers, and other persons in descending order of the amount paid.

<p>(a) Total amount of commissions paid 23528</p>	<p>(b) Total amount of fees paid 141</p>
--	---

3 Persons receiving commissions and fees. (Complete as many entries as needed to report all persons).

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid
MARK S METTILLE **107 CANDLELIGHT LANE**
MORRIS, IL 60450

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	
22314			3

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid
PATRIOT GROWTH INSURANCE **7639 E PINNACLE PEAK RD STE 100**
SCOTTSDALE, AZ 85255

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	
1214	141		3

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

Part II Investment and Annuity Contract Information
 Where individual contracts are provided, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

4 Current value of plan's interest under this contract in the general account at year end	4	
5 Current value of plan's interest under this contract in separate accounts at year end.....	5	

6 Contracts With Allocated Funds:

a State the basis of premium rates ▶

b Premiums paid to carrier **6b**

c Premiums due but unpaid at the end of the year **6c**

d If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, enter amount. **6d**
 Specify nature of costs ▶

e Type of contract: (1) individual policies (2) group deferred annuity
 (3) other (specify) ▶

f If contract purchased, in whole or in part, to distribute benefits from a terminating plan, check here ▶

7 Contracts With Unallocated Funds (Do not include portions of these contracts maintained in separate accounts)

a Type of contract: (1) deposit administration (2) immediate participation guarantee
 (3) guaranteed investment (4) other ▶

b Balance at the end of the previous year **7b**

c Additions: (1) Contributions deposited during the year **7c(1)**
 (2) Dividends and credits..... **7c(2)**
 (3) Interest credited during the year..... **7c(3)**
 (4) Transferred from separate account **7c(4)**
 (5) Other (specify below)..... **7c(5)**
 ▶

(6) Total additions **7c(6)**

d Total of balance and additions (add lines **7b** and **7c(6)**) **7d**

e Deductions:

(1) Disbursed from fund to pay benefits or purchase annuities during year **7e(1)**
 (2) Administration charge made by carrier..... **7e(2)**
 (3) Transferred to separate account **7e(3)**
 (4) Other (specify below)..... **7e(4)**
 ▶

(5) Total deductions **7e(5)**

f Balance at the end of the current year (subtract line **7e(5)** from line **7d**)..... **7f**

Part III Welfare Benefit Contract Information
 If more than one contract covers the same group of employees of the same employer(s) or members of the same employee organizations(s), the information may be combined for reporting purposes if such contracts are experience-rated as a unit. Where contracts cover individual employees, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

8 Benefit and contract type (check all applicable boxes)

- a** Health (other than dental or vision)
- b** Dental
- c** Vision
- d** Life insurance
- e** Temporary disability (accident and sickness)
- f** Long-term disability
- g** Supplemental unemployment
- h** Prescription drug
- i** Stop loss (large deductible)
- j** HMO contract
- k** PPO contract
- l** Indemnity contract
- m** Other (specify) ▶

9 Experience-rated contracts:

a	Premiums: (1) Amount received	9a(1)	
	(2) Increase (decrease) in amount due but unpaid	9a(2)	
	(3) Increase (decrease) in unearned premium reserve	9a(3)	
	(4) Earned ((1) + (2) - (3))		9a(4)
b	Benefit charges (1) Claims paid	9b(1)	
	(2) Increase (decrease) in claim reserves	9b(2)	
	(3) Incurred claims (add (1) and (2))		9b(3)
	(4) Claims charged		9b(4)
c	Remainder of premium: (1) Retention charges (on an accrual basis) --		
	(A) Commissions	9c(1)(A)	
	(B) Administrative service or other fees	9c(1)(B)	
	(C) Other specific acquisition costs	9c(1)(C)	
	(D) Other expenses	9c(1)(D)	
	(E) Taxes	9c(1)(E)	
	(F) Charges for risks or other contingencies	9c(1)(F)	
	(G) Other retention charges	9c(1)(G)	
	(H) Total retention		9c(1)(H)
	(2) Dividends or retroactive rate refunds. (These amounts were <input type="checkbox"/> paid in cash, or <input type="checkbox"/> credited.)		9c(2)
d	Status of policyholder reserves at end of year: (1) Amount held to provide benefits after retirement		9d(1)
	(2) Claim reserves		9d(2)
	(3) Other reserves		9d(3)
e	Dividends or retroactive rate refunds due. (Do not include amount entered in line 9c(2).)		9e

10 Nonexperience-rated contracts:

a	Total premiums or subscription charges paid to carrier	10a	455497
b	If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, other than reported in Part I, line 2 above, report amount.	10b	

Specify nature of costs.

Part IV Provision of Information

11 Did the insurance company fail to provide any information necessary to complete Schedule A? Yes No

12 If the answer to line 11 is "Yes," specify the information not provided. ▶

TEMPE LIFE CARE VILLAGE, INC.
 2645 E. SOUTHERN AVE
 TEMPE AZ 85282

FORM 5500 INFORMATION
 SCHEDULE A - Insurance Information & SCHEDULE C - Service Provider Information

TEMPE LIFE CARE VILLAGE, INC.
DBA FRIENDSHIP VILLAGE OF TEMPE

SCHEDULE A - INSURANCE INFORMATION

Name of Insurance Carrier: Blue Cross Blue Shield of Arizona
 EIN (Employer Identification Number): 860004538
 BCBSAZ NAIC Code: 53589
 Contract or Identification Number (Group No.): 000341
 Approximate Number of Medical Persons Covered at End of Policy or Contract Year: 525
 Approximate Number of Dental Persons Covered at End of Policy or Contract Year: 516
 Policy or Contract Year: From: January 1, 2024 To: December 31, 2024

Benefit and Contract Type:
 Fully Insured Prospective
 Health, Drug, Dental

Experienced - Rated Contract (If Yes, See Attached): No
 Non-Experience-Rated Contract: Yes
 Total Medical Premiums or Subscription Charges Paid to Carrier: \$ 3,442,123.21
 Total Dental Premiums or Subscription Charges Paid to Carrier: \$ 173,918.64

BROKER COMPENSATION INFORMATION

(Broker Compensation may need to be allocated between Schedule A and Schedule C as applicable for ASC with Stop-Loss Contracts)

Broker Name:	PATRIOT GROWTH INS SVCS LLC	Medical	Dental
Broker Address:	SUITE 215 501 OFFICE CENTER DRIVE	\$ 7,105.88	\$ -
Broker Address:	FORT WASHINGTON, PA 19034		
Broker Name:	0	\$ -	\$ -
Broker Address:	0		
Broker Address:	0		
Amount of Medical and Dental Sales & Base Commissions Paid to Broker:		\$ 7,105.88	\$ -

Fees and Other Broker Compensation:

Amount:	\$ -	Purpose:	1* Special Incentive
Amount:	\$ -	Purpose:	2** Meals, Gifts & Tickets
Total	\$ -		

1* Special Monetary Incentives (SMI) may occasionally be paid to Brokers for sales and/or policy renewals directly related to all Groups. SMI differs from Base Broker Commissions and is subject to different rules governing eligibility and payment. SMI specifically linked to the sale or renewal of all Groups will be reported on the BCBSAZ Form 5500 Disclosure for that Group under the caption "Special Incentive". SMI that cannot be reasonably and specifically linked to the sale or renewal of one or more Groups will be allocated equally to all Groups represented by the Broker that qualified the Broker for the SMI. For example, if a SMI of \$5,000 was paid to the Broker and the Broker qualified for the SMI through sale and/or renewal of five Groups, \$1,000 (\$5,000/5) will be allocated and reported on the Form 5500 Disclosure for each of the Groups under the caption "Special Incentive".

2** Gifts, Gratuities, Meals, Tickets to Entertainment Venues and Charitable Events (Non-Monetary Broker Compensation) provided to Brokers and individually valued in excess of \$10 are identified and reported on BCBSAZ Form 5500 Disclosures (if a \$100 aggregate amount is reached) for all Groups according to the following rules: Non-Monetary Broker Compensation (NMBC) directly linked to a specific Group is reported on the BCBSAZ Form 5500 Disclosure only for that Group under the caption "Meals, Gifts & Tickets".

SCHEDULE C - SERVICE PROVIDER INFORMATION

(Broker Compensation may need to be reported as Indirect Compensation on Schedule C for ASC with Stop-Loss Contracts)

Schedule C - Applicable for this Contract

Schedule C - Not Applicable for this Contract

Name of Service Provider: Blue Cross Blue Shield of Arizona
EIN (Employer Identification Number): 860004538
Service Code Information:
Contract Administration

Total Direct Compensation Paid by the Plan(Admin Fee): \$ -

BCBSAZ hereby certifies that the information on this form, furnished pursuant to 29 CFR 2520.103-5(c), is accurate and complete as of the date of this report



Scott Mack, Vice President - Group Underwriting

2025 Schedule A/5500 Information

[Print](#) [Email](#)

2024 Schedule A/5500 Information

From

01/01/2024

To

12/31/2024

Plan Number

00462838

Plan Name

TEMPE LIFE CARE
VILLAGE, INC. DBA

FRIENDSHIP VILLAGE
OF TEMP

Guardian's EIN

13-5123390

Guardian's NAIC

64246

Approximate number of employees covered at the end of the plan year

458

**Group Insurance coverage(s) included under
this plan**

Vision (Insured)

Short Term Disability (Insured)

Optional Life

Optional AD&D

Long Term Disability

Life

Dental (Alternately funded)

AD&D

Accident

Commissions**Total Commissions**

The following figure represents commissions that are to be reported on Schedule A, Line 3, Element (b):

Contract ID	Contract name	Commissions paid
000RT375	PATRIOT GROWTH INSURANCE SERVI	\$1,213.97
000VK840	MARK S METTILLE	\$22,313.85
Total commissions for plan		\$23,527.82

000RT375-PATRIOT GROWTH INSURANCE SERVI

7639 E PINNACLE PEAK RD STE 10 SCOTTSDALE AZ 85255

Group insurance coverages	Commissions paid
Optional AD&D	\$1,213.97

Total commissions for contract \$1,213.97

000VK840-MARK S METTILLE

107 CANDLELIGHT LANE MORRIS IL 60450

Group insurance coverages	Commissions paid
AD&D	\$257.02
Accident	\$1,766.65
Life	\$1,927.75
Long Term Disability	\$4,907.44
Optional AD&D	\$466.91
Optional Life	\$4,557.47
Short Term Disability (Insured)	\$7,155.41
Vision (Insured)	\$1,275.20
Total commissions for contract	\$1,213.97

Fees



Total fees

The following figure represents fees that are to be reported on Schedule A, Line 3, Element (c)

Contract ID	Contract name	Amount
000NZ360	PATRIOT GROWTH INSURANCE SERVICES	\$140.90
Total Fees Paid		

One time reimbursement

However, the compensation above is not charged to your case in calculating new rates.

Recipient of One Time Reimbursement	Amount Paid
Total Fees Paid	

Group insurance coverages	Gross premium paid
----------------------------------	---------------------------

	\$7,878.59
AD&D	\$5,153.32
Accident	\$35,448.57
Life	\$38,651.89
Long Term Disability	\$98,357.54
Optional AD&D	\$9,338.22
Optional Life	\$91,476.46
Short Term Disability (Insured)	\$143,602.06
Vision (Insured)	\$25,590.24
<hr/>	
Total premium paid	\$455,496.89
<hr/>	
Premium due (unpaid) at the end of the year	\$0.00
<hr/>	

Indirect compensation - Schedule C, Part 1,3, Elements (a & c)

The following figure represents indirect Compensation to be reported on Schedule C, Part 1,3, Elements(a & c)

Contract Identification (a)	Name and Address of Recipient of Indirect Compensation (a)	Amount (c)
<hr/>		
Total Indirect Compensation Paid:		

Indirect compensation - Schedule C, Part 1,3, Elements (b, d & e)

The following figure represents indirect Compensation information to be reported on Schedule C, Part 1,3, Elements(b, d & e)

Service Code (b)	Name and Address (d)	Indirect Compensation (e)
<hr/>		
<hr/>		

[Back](#)