

**SUMMARY ANNUAL REPORT FOR  
TAX MANAGEMENT ASSOCIATES, INC. HEALTH AND WELFARE PLAN**

This is a summary of the annual report of the Tax Management Associates, Inc. Health and Welfare Plan (Employer Identification Number 56-1507131, Plan Number 506) for the plan year 09/01/2016 through 08/31/2017. The annual report has been filed with the Employee Benefits Security Administration, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

**Insurance Information**

The plan has insurance contracts with UnitedHealthcare Insurance Company, The Lincoln National Life Insurance Company, The Guardian Life Insurance Company of America, Vision Service Plan and American Heritage Life Insurance Company to pay certain Health, Life insurance, Accidental Death & Dismemberment, Long-term disability, Dental, Vision, Accident, Critical Illness and Hospital claims incurred under the terms of the plan. The total premiums paid for the plan year ending 08/31/2017 were \$1,196,708.

**Your Rights to Additional Information**

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. Insurance information, including sales commissions paid by insurance carriers.

To obtain a copy of the full annual report, or any part thereof, write or call the plan administrator, at 5121 Parkway Plaza Blvd, Charlotte, NC 28217 and phone number, 704-847-1234.

You also have the legally protected right to examine the annual report at the main office of the plan: 5121 Parkway Plaza Blvd, Charlotte, NC 28217, and at the U.S. Department of Labor in Washington, D.C., or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, Room N-1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, N.W., Washington, D.C. 20210.