

# ERISA FIDELITY BOND FOR YOUR RETIREMENT PLAN

## ERISA Fidelity Bond Requirement

Under Department of Labor (DOL) regulations, your retirement plan will need to maintain an ERISA Fidelity Bond. A fidelity bond protects the assets in the plan from misuse or misappropriation by the plan fiduciaries. Plan fiduciaries include the plan trustees and any person who has control over the management of the plan and its assets.

## Required ERISA Fidelity Bond Amount

**Qualifying Assets** - The bond must equal to 10% of the value of the total plan assets, with a minimum bond value of \$1000 and a maximum bond value of \$500,000.

**Non-Qualifying Assets** - If more than 5% of the plan assets are non-qualifying, bond must equal to 100% of the value of the non-qualifying assets.

## Colonial Surety Company

Colonial Surety Company is a trusted source of ERISA Fidelity Bonds since 1930. Colonial is licensed in all U.S. states and territories, treasury listed, and rated Excellent by A.M. Best Company. Their bond form is DOL approved, and their staff is fully educated in ERISA regulations and requirements.

To apply for proper bond coverage, click below:

[Apply](#)

You may also contact [Michael Bonfante](#), who will be more than happy to assist:

201-949-1134 or [mbonfante@colonialsurety.com](mailto:mbonfante@colonialsurety.com)

