



INVOICE NO. 537

3.7.2025

BILL TO

Attn: Mr. Brian Hofmeister, Esq.
Members Health Plan NJ
3131 Princeton Pike
Building 5 Suite 110
Lawrenceville, NJ 08648

REMIT PAYMENT TO:

Concord Management Resources LLC
Attn: John J. McSorley, President & CEO
P.O.Box 369
Chester, NJ 08873

For Billing questions please call (908) 293-6101 or email jmcSorley@concordmgt.com

DATE	STAFF	DESCRIPTION	HOURS
2/3/2025	JM	Team conference call to discuss assorted APEMT issues and email follow ups, 5500 discussion and follow ups	1.75
2/4/2025	JM	Accounting posting and reconciliations	2.50
2/5/2025	JM	Fortis Mazur discussions regarding 5500s email follow ups and M-1 discussion	0.50
2/6/2025	JM	Fortis Mazur discussions regarding 5500s email follow ups	1.50
2/10/2025	JM	Team conference call to discuss assorted APEMT issues and email follow ups, update financial info for Status report, Discuss B of A bank letter	2.00
2/11/2025	JM	Fortis Mazur discussions regarding 5500s email follow ups	1.50
2/12/2025	JM	Accounting posting and reconciliations, 5500 updates discussion	1.50
2/18/2025	JM	Call with Bill.com re: Planning, 5500 final review and signing, discuss Custodial account statements	1.50
2/19/2025	JM	Team conference call to discuss assorted APEMT issues and email follow ups, custodial account change, accounting postings and reconciliations	1.50
2/24/2025	JM	Team conference call to discuss assorted APEMT issues, bank account address change	2.00
2/26/2025	JM	Emails with Mazars BWH re 1041 filings, update schedules	2.50
2/27/2025	JM	Emails with Mazars BWH re 1041 filings	1.60
2/3/2025	DC	Team conference call to discuss assorted APEMT issues/M1 filing call and review	0.75



DATE	STAFF	DESCRIPTION	HOURS
2/4/2025	DC	M1 filings/Rawlings data/Review 5500s	1.25
2/5/2025	DC	Additional data requests from Rawlings	0.40
2/6/2025	DC	Reconciliation of Mitnick File	0.60
2/8/2025	DC	Reconciliation of Mitnick File	1.50
2/10/2025	DC	Team conference call to discuss assorted APEMT issues	0.60
2/11/2025	DC	Review various emails	0.40
2/14/2025	DC	Review IRS Decision, Draft 2024 5500 and various emails	0.60
2/18/2025	DC	Call with trustee professional/Bill.com and call with DFL on file	1.00
2/19/2025	DC	Team conference call to discuss assorted APEMT issues/M1 filing call and review for 5500	0.50
2/20/2025	DC	Aetna monthly call/mailings of invoice letters	0.75
2/21/2025	DC	Review of BB information/SPD and NJ Law	0.80
2/24/2025	DC	Team conference call to discuss assorted APEMT issues/Data pull and clean up for meeting/review IRS decision	1.25
2/25/2025	DC	Review various emails	0.25
2/27/2025	DC	Review and send various emails	0.40
2/3/2025	BG	Team Meeting with APEMT to Discuss APEMT Issues	0.50
2/3/2025	BG	Reviewed and Exchange of Communications and documents related to APEMT Issues	0.25
2/10/2025	BG	Team Meeting with APEMT to Discuss APEMT Issues	0.50
2/10/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.25
2/11/2025	BG	Created and sent Communications and documents related to APEMT Issues	0.50
2/12/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.25
2/13/2025	BG	Created and sent Communications and documents related to APEMT Issues	0.50



DATE	STAFF	DESCRIPTION	HOURS
2/14/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.50
2/17/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.40
2/19/2025	BG	Team Meeting with APEMT to Discuss APEMT Issues	0.50
2/20/2025	BG	Reviewed Communications and documents related to APEMT Issues	1.00
2/24/2025	BG	Team Meeting with APEMT to Discuss APEMT Issues	0.50
2/24/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.40
2/28/2025	BG	Reviewed Communications and documents related to APEMT Issues	0.50
2/4/2025	VS	Submitted M-1 for 2023 and 2024	0.50
2/7/2025	VS	Request for member 1095-B form from 2021, emailed to member.	0.25
2/14/2025	VS	Uploaded invoices on website & sent Constant Contact.	0.50

TOTAL HOURS 39.20

TOTAL PROFESSIONAL SERVICES \$23,020.00

Reviewed and Approved for Payment

SUMMARY OF PROFESSIONAL SERVICES

Name	Staff Level	Hours	Rate	Total
John J. McSorley	JM Member/CEO	20.35	600.00	\$ 12,210.00
Dawn Clessuras	DC Member/COO	11.05	600.00	\$ 6,630.00
Bridget Gielis	BG Member EVP Sales/Marketing	6.55	600.00	\$ 3,930.00
Valerie Seto	VS Sr. Director Client Operations	1.25	200.00	\$ 250.00
TOTALS		39.20		\$ 23,020.00

Reviewed and Approved for Payment

OUT-OF-POCKET EXPENSES

02/14/2025 – Constant Contact Monthly \$ 463.00

Total OUT-OF-POCKET Expenses Reviewed and Approved for Payment \$ 463.00

Total Due this Invoice by 04/04/2025 \$ 23,483.00

Reviewed and Approved for Payment

From: [Dawn Clessuras](#)
To: [John McSorley](#)
Subject: FW: EXTERNAL: Constant Contact Payment Receipt for Bridget Gielis
Date: Friday, February 14, 2025 10:22:03 AM

Dawn Clessuras

Chief Operating Officer
Concord Management Resources

PLEASE NOTE ADDRESS CHANGE

M: PO Box 369, Chester, NJ 07930

A: 90 Washington Valley Road - #1338, Bedminster, NJ 07921

P: 908.293.6103 **F:** 908.293.6099 **M:** 908.285.0458

E: dclessuras@concordmgt.com **W:** www.concordmgt.com

From: Constant Contact Billing <notification@constantcontact.com>
Sent: Friday, February 14, 2025 3:05 AM
To: Dawn Clessuras <dclessuras@concordmgt.com>
Subject: EXTERNAL: Constant Contact Payment Receipt for Bridget Gielis

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.



Payment Receipt for February 14, 2025

Thank you for your recent payment. Your payment receipt is found below.

Attention: Bridget Gielis

Concord Management Resources

1 Mill Ridge Lane

Suite 100

Chester, NJ 07930

US

9082936103

User Name: mewasales@concordmgt.com

Today's Date: February 14, 2025

Payment Date: February 14, 2025

Payment Method: VI (last 4 digits: 4011)

Amount: \$463.00 Reviewed and Approved for Payment

Thank you for your payment!

Amounts shown may reflect sales tax which is applicable in certain areas.

You can view payment receipts at any time in the Billing tab of your account.

Important Notice: To help maintain Constant Contact's strong sending reputation, we have implemented a monthly email send allowance and overage fee if the allowance is exceeded. This charge will be reflected on your next invoice, if you exceed the allowance. While most of our customers won't be impacted, [click here](#) to learn more.

We appreciate your business.

Best Regards,

Constant Contact Billing

1601 Trapelo Road, Suite 329 - Waltham, MA 02451

Questions? [Please give us a call!](#)

US / Canada Toll Free: [\(855\) 229-5506](tel:(855)229-5506)

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