

# TAG: Controlled Group Analysis



The **Technical Answer Group (TAG)** is a team of specialists with an average of more than 25 years of experience, who respond to hundreds of technical questions submitted by pension professionals each day. In addition to answering your questions within one business day, TAG gives you links to primary source materials, an extensive database of previously asked questions, industry and legislative news updates, and much more.

## We are now offering a controlled group analysis service at TAG!

Need to know if you have a controlled group on your hands?

Determining whether two or more organizations must be treated as a single employer under the controlled group rules involves a complex analysis of ownership interests – let the TAG expert team help you!

We will provide you with a brief form to fill out providing us with the key details of your controlled group situation (i.e. the number of companies/names and ownership information).

This will allow us to provide you with a price quote for the study for your approval before work begins.

Completed Controlled Group analysis will include a spreadsheet outlining all the steps taken (what and why), final result (example below) and cover letter providing additional details.

Companies/owners	Controlled group #1			Controlled group #2									Controlled group #3	
	Timber Manor Group, LLC	Redwood Manor Group, LLC	Evergreen Manor Group, LLC	Premier Financial Services, LLC	Premier Title Agency, LLC	Tallgrass LTC Management, LLC	Timber LTC Management, LLC	Redwood Health Care Management, LLC	Evergreen LTC Management, LLC	Evergreen Nursing Home	Pharmaceutical Services, LLC	Staffing By Premier, Inc.	JKB Healthcare Consulting, LLC	Kopale & Baird, LLC (CPA Practice)
Gene & Diana	35.0%	35.0%	35.0%	40.0%	40.0%	50.0%	50.0%	50.0%	50.0%	50.0%	50.0%	50.0%		
Howard	17.5%	17.5%	17.5%	20.0%	20.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	50.0%	50.0%
Scott	17.5%	17.5%	17.5%	20.0%	20.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	50.0%	50.0%
Tim GCNH														
Odyssey View	20.0%	20.0%	20.0%											
J. Wilson	10.0%	10.0%	10.0%											
Total	100.0%	100.0%	100.0%	80.0%	80.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

It's that simple! Allow the TAG expert team to help you the next time you have a control group analysis you need help with!

For more information, contact your ftw Sales Consultant or email us at [taganswers@wolterskluwer.com](mailto:taganswers@wolterskluwer.com).