

Problem viewing this email? [Click here](#) for our online version.



## THE VBA WILL BE CLOSED

**Friday, July 4** in observance of Independence Day

A group photo of eight people, seven women and one man, standing and sitting outdoors on a brick patio. They are all dressed in professional business attire. The background shows greenery and a building.

## JULY 2025 ACTION ITEMS

WHAT DO I NEED TO DO? 

- Review Q3 Well-Being Toolkit
- Distribute 401(k) Plan SMMs
- Register for Upcoming Trainings & Pool Peer Group Conference
- Save the Date for Fall Meetings

VIRGINIA BANKERS ASSOCIATION  
Benefits Corporation

## BENEFIT BOOST

## BSWIFT'S NEW DIGITAL EXPERIENCE - COMING SOON!

Bswift will soon be enhancing its homepage to increase the 3 E's:

Education, Enrollment, and Engagement.

Click on the flyer to the right for more information.



## HR: HEART OF THE WORKPLACE

### NEWS FROM MEMBER BANK ADMINISTRATORS LIKE YOU



**Carla Moore, Human Resources Director of the Virginia Bankers Association & Mid-Atlantic Bankers Association** just returned from an unforgettable family adventure to France!

"It was the perfect blend of culture, history, and coastal charm. Whether strolling along the famous boardwalk in Nice or enjoying seaside meals with a view, every moment was filled with joy, discovery, and wonderful quality family time."

Click on the picture to the left to view.

### SUBMIT CONTENT FOR THE NEXT FYB NEWSLETTER

Whether you're celebrating a new baby, a professional achievement, or a personal adventure - this space is designed to share your news with fellow bank administrators.

Let's celebrate the achievements, joys, and life moments that make our community stronger. Click on the image to the right to share your story (and photos) in the next FYB newsletter!



## WELLNESS SPOTLIGHT

### 2025 Q3 WELL-BEING TOOLKIT: PREVENTIVE CARE

The VBA Benefits Corp. is focusing on **Preventive Care** for the third quarter of 2025. This quarter features campaign options, online tools,

and downloadable materials to support employee communications.

**Click on the flyer to the right!** Please note it is for administrators only.

Resource distribution dates are not assigned, allowing employers to set their own timelines as discussed at the Well-being Summit.

**Questions?** The [Benefits Team](#) can help.



## COMPLIANCE CORNER

### DEPENDENT VERIFICATION AUDIT

**We will be conducting a Dependent Verification Audit in August.** This audit is a common business practice to ensure compliance with our benefit plan guidelines and regulations, accurately manage healthcare costs, and guarantee fair distribution of benefits to your employees and their dependents.

You will be receiving more detailed information via email on July 10th, so please be on the lookout and contact the [Benefits Team](#) if you have any questions.

## RETIREMENT

### DISTRIBUTE 401(K) PLAN SMMs BY JULY 28

Changes to your 401(k) Plan that were effective January 1, 2025 (or earlier), must be described in a Summary of Material Modifications (SMM) or an updated Summary Plan Description and sent to participants by July 28, 2025.

VBA sent SMMs to 401(k) Plan sponsors earlier this year. If you did not distribute the SMM when you received it, or aren't sure if you received the SMM, please contact [Claire Pollock](#).

## TRAINING OPPORTUNITIES

### HEALTH & WELFARE

#### **bswift Reports & Excel Manipulation - July 15 at 10am**

Common bswift reports and examples of how to utilize them within Excel. **This event is free to attend;** however, [registration is required](#).

#### **Connection between Adoption Agreements & bswift - September 10 at 10am**





Understand how your Adoption Agreement selections are reflected in bswift. **This event is free to attend**; however, [registration is required](#).

Contact the [Benefits Corp. Team](#) to see if the trainings are suitable for you or someone else on your team.

## AUGUST 19 POOL PEER GROUP CONFERENCE

Join us for our annual Pool Bank Peer Group Conference on Tuesday, August 19<sup>th</sup> at the VBA office from 10am - 3pm. [Registration is required](#) for this free event by July 31st.

Topics include a 2026 renewal preview, an update on our 2025 initiatives, as well as opportunities to connect with your peers and our partners. More details coming soon!

## SUCCESS: MENTAL HEALTH FIRST AID CERTIFICATION

The Benefits Corp recently provided two Mental Health First Aid Certification virtual trainings with 14 participating employers (approximately 50 attendees).

We are thrilled with such a positive response to this training and are exploring the option of an additional training in early 2026.

Click on the picture to the right to view.



## IN OTHER NEWS...

### FALL MEETINGS

**Save the date!**

Click on the flyer to the right to view the VBA Benefits Corp Fall Meeting options.

Registration links will be provided at a later date.

**Questions?** Contact the [Benefits Team](#).

VIRGINIA BANKERS  
ASSOCIATION  
Benefits Corporation

2025

# FALL MEETINGS

## SAVE THE DATE

TUES <b>30</b> SEPT	<b>CENTRAL VIRGINIA</b> VBA OFFICE
WED <b>1</b> OCT	<b>SOUTHWEST VIRGINIA</b> ABINGDON
THURS <b>2</b> OCT	<b>VIRTUAL</b>

FOLLOW US AT



[Manage Email Preferences](#)

4490 Cox Road Glen Allen, VA 23060  
804-643-8060

