

## **Employee Benefit Services - Provided to All our Clients**

### **Strategic Planning & Analysis**

- ✓ Establish short and long term goals for employee benefits plan
- ✓ Obtain and review all relevant client and vendor data
- ✓ Profile employee population
- ✓ Review plan designs
- ✓ Conduct claims and utilization reviews
- ✓ Perform benchmarking studies
- ✓ Evaluate funding method
- ✓ Evaluate contribution strategies
- ✓ Present strategic employee benefit analysis as needed, including:
  - Critique of current plans
  - Discussion of available options
  - Recommendations
- ✓ Prepare annual account management plan based on client decisions

### **Vendor Management**

- ✓ Analysis and negotiation of renewal proposals from current vendors
- ✓ Conduct plan marketing as warranted including
  - Prescreening of candidates
  - Development of proposal and evaluation criteria
  - Selection of vendor finalists
- ✓ Review vendor contract to ensure accuracy and protect and promote client's interest
- ✓ Monitor vendor performance over the plan year to ensure compliance and quality
- ✓ Review all vendor documents for plan members
- ✓ Ongoing liaison between client and vendor

## **Account Management**

- ✓ Prepare annual calendar of benefit activities and deliverables for upcoming plan year
- ✓ Schedule and conduct annual series of client meetings to review program status
- ✓ Fulfill agreed upon timing and delivery of claims utilization reports
- ✓ Assist in planning and implementation of open enrollment
- ✓ Help plan and participate in client events related to benefits
- ✓ Resolve day-to-day and escalated service issues
- ✓ Compliance and regulatory support, including:
  - Legislative and compliance updates
  - Signature-ready Form 5500 filing
  - Employee communications support
- ✓ Executive Benefits consulting