



insurance consulting

...take out the annual "juggle"



Do you have an "open wound" in your budgeting process every year while you wait for your dreaded health insurance renewal? Are you tired of the annual "juggle" of your health insurance costs where you either pay more, change carriers and plans, limit coverage, shift costs to your employees, or a combination thereof? *None of these are long-term solutions!*

we've got you covered

health insurance consulting

- Small/Large Group
- Full Insured, Level Funded, Self-Insured
- ICHRA with Individual Health Plans
- Medicare

additional services

- Biometric testing
- Section 125
- HSA
- Near site clinic
- Financial planning or intellisteps

employee education

- Group Meetings
- One-on-One Consultations

ancillary insurance consulting

- Base & Voluntary Life
- Dental
- Short & Long-Term Disability
- Vision
- Accident
- Cancer/Critical Illness
- Hospital Indemnity
- Pet



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intellicients®

client support services

- Provider selection, monitoring, and review
- HR automation for benefits, eligibility, enrollment, billing, & administration
- Compliance support & ERISA documentation
- Benefit marketing & negotiation
- Defined Contribution Approach
- Consumer-Driven Plan Design Strategies
- Network, Claims, & Rx Analysis
- Alternative Funding Strategies
- Private Clinic Feasibility Study

participant education & advice

- Plan specific enrollment group meetings
- Choosing the "right" health plan to fit your family's needs and budget
- Selecting the proper plan, network, & reimbursement
- Importance of your physical wellness plan
- Properly using risk mitigation strategies
- Financial planning with taxed advantaged accounts
- Financial wellness planning

intelligents service structure

It all starts with great people. Then complemented with technology solutions - with the underlying goal of becoming your partner in delivering an employee benefits program that helps attract and retain your most valuable asset... *your employees.*

your consulting team

Helps you build an employee benefits program that fits your budget and makes you a great place to work.

your relationship manager

Tactically responsible for the day-to-day execution of the strategies put in place.

client services

Dedicated internal staff for fulfillment of required benefits information and education material for your employees.

personal financial management team

Help your employees become financially fit; and take a more holistic approach to their overall financial situation.



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