

Capital Services

Elite Broker



Together



Capital Services creates and implements individualized solutions for each company backed by an analysis of gaps in coverage, compliance, and competitive offerings. Offering guidance in employee benefits, personal and business planning, HR consulting, and wellness planning, CSI is committed to building a thriving workforce, protecting employees, and increasing productivity.

Capital Services offers a relationship between its customers and the PlanSource HR and benefits system, delivering comprehensive features to help with benefits shopping, enrollment, billing, and ACA compliance. PlanSource takes care of all the implementation and ongoing support with CSI's customers, so they have direct access to the system's experts.

PlanSource's Elite Partner program is designed to maintain a strong business relationship with the top insurance brokers in the country, leading to direct pricing and service advantages for those brokers' clients. PlanSource is dedicated to creating a better benefits experience, from development, planning and implementation to training, ongoing support and guidance.

An Investment in PlanSource Delivers Benefits



Greater Efficiency



More Control



Increased Flexibility



Reduced Costs



Lower Turnover

PlanSource is Strong Where Others Are Weak



Benefits Expertise

PlanSource is a broker-friendly solution that lives and breathes benefits – and it shows when employers use the product and users reach out for assistance.



Single Platform

Built as a single product on a single code base, PlanSource offers a highly configurable rules engine and branding and personalized framework.



Customer Satisfaction

Customers are top of mind for everyone at PlanSource. We are customer-focused, and have been honored with industry-leading Net Promoter Scores.



Information Security

PlanSource is a proven, SSAE16 SOC 2 Type 2 audited technology platform that is dedicated to system stability and customer data security.



HCM Marketplace

With a full suite of best-of-breed HCM software partners, PlanSource delivers an all-in-one solution for HR, benefits and payroll.