



# USI Insurance

PlanSource Elite Broker

## How We Work



USI has served over 100,000 clients meeting their property and casualty, employee benefit, personal risk, and retirement needs nationwide. With more than 100 years of consulting and brokerage experience, USI combines industry-leading national capabilities delivered through passionate and committed local service teams.



USI Insurance selected PlanSource – an industry leader in benefits administration – as a technology partner. Nearly 10,000 employers and 3.5 million consumers use PlanSource for benefits shopping, enrollment, billing, compliance and administration. USI has been trained and certified to act as the point of contact for the PlanSource system.



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.

## An Investment in PlanSource Delivers Benefits



**Automate Processes**



**Engage Employees**



**Maintain Control**



**Ensure Compliance**



**Keep Accurate**

## What Makes PlanSource the Best?



**Flexible System**

That supports multiple employee populations and complex business rules



**Strong Partnerships**

With carriers that provide financial credits making PlanSource an affordable choice



**Proven Technology**

That provides a compliant and secure solution that scales for small and large employers

# PlanSource Offers the Best Experience For



Benefits Shopping



Enrollment



Billing



Compliance



Administration

## A Mobile-Friendly Employee Experience



**People-Friendly Experience**



**Tailor-Made Recommendations**

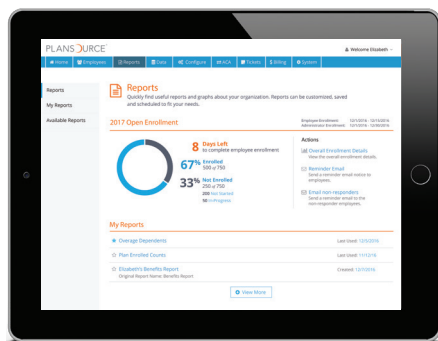


**Shopping Cart and Checkout**



**Educational Videos and Content**

## Sophisticated Benefits Administration and Automation



**Eligibility Management**



**Open Enrollment and Life Events**



**Employee Communications**



**Cost Calculations**



**Flexible Reporting**



**Data Exchange with Carriers**