



Bancorp South

PlanSource Elite Broker

How We Work



Bancorp South Insurance offers customized solutions for each business client, knowing that small businesses are often the most vulnerable. Bancorp South's risk management, employee benefits, and insurance policy programs have a proven record of helping organizations improve the way they develop, manage, and administer employee benefits programs.



Bancorp South Insurance 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. Bancorp owns the overall business and technical relationship with its customers, receiving certified training 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

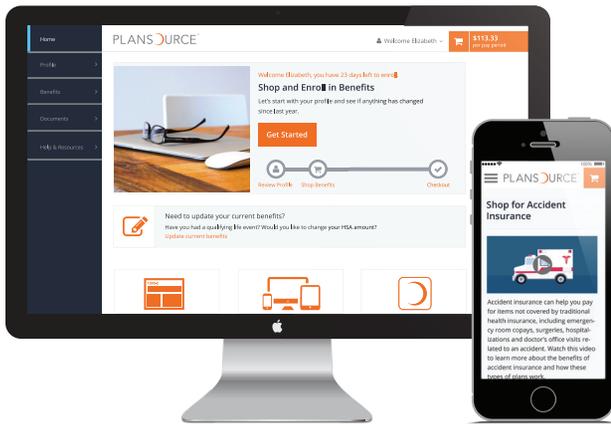


Compliance



Administration

A Mobile-Friendly Employee Experience



People-Friendly Experience



Tailor-Made Recommendations

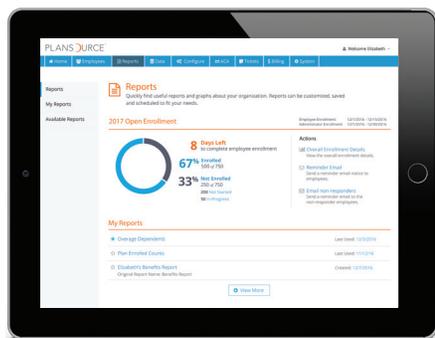


Shopping Cart and Checkout



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