The Cross Agency
PlanSource Elite Broker

How We Work

The Cross Agency represents more than 15,000 employee benefits clients throughout New England in benefits consulting, compliance, education, and administration. Their account management teams are structured to allow for enough flexibility to meet diverse demands, individually fine-tuning their benefits strategy as needed.

The Cross Agency selected PlanSource – an industry leader in benefits administration – as its technology partner. Nearly 10,000 employers and 3.5 million consumers use PlanSource for benefits shopping, enrollment, billing, compliance and administration. The Cross Agency 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
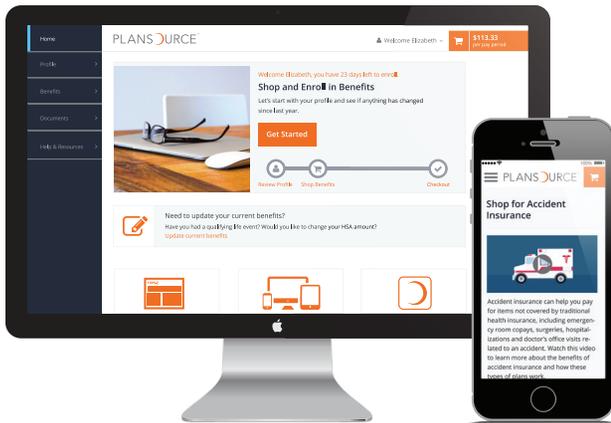
Benefits Shopping → Enrollment → Billing → Compliance → Administration

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A Mobile-Friendly Employee Experience

People-Friendly Experience

Tailor-Made Recommendations

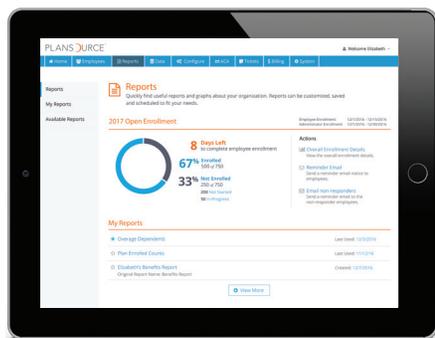**Shopping Cart and Checkout**

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