



Lockton

PlanSource Elite Broker

How We Work



Lockton is the world's largest privately owned insurance brokerage firm, offering risk management, employee benefits, retirement services, and industry expertise to help make businesses better. By assessing each company's specific needs and utilizing an extensive pool of resources, Lockton delivers an enhanced benefits management experience.

Lockton 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. Lockton 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

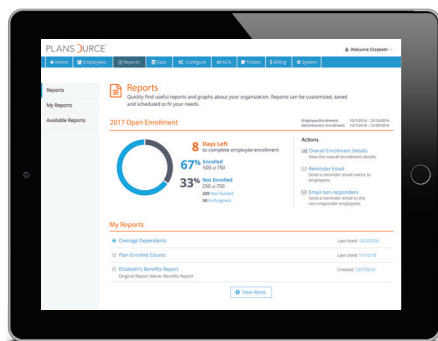


Shopping Cart and Checkout



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