



# Corporate Synergies

PlanSource Elite Broker

## CORPORATE SYNERGIES®

Corporate Synergies is a national insurance broker and employee benefits brokerage that excels in crafting creative plan designs and resolving compliance risk. The firm delivers strategies that control costs, relieve administrative burdens and mitigate risk. Its experts develop a deeper understanding through established listening posts in all areas of their competencies, fueling the ability to better execute.

### How We Work



Corporate Synergies 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. Corporate Synergies has been trained and certified to implement and support its clients on the PlanSource system.

## PLANSOURCE®

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**

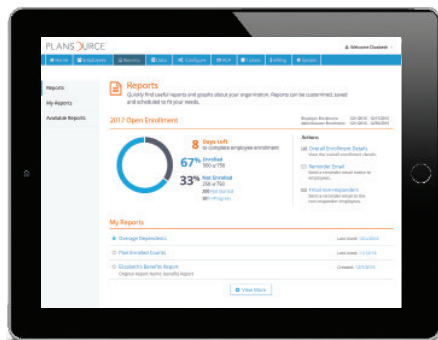


**Shopping Cart and Checkout**



**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**