

PlanSource and Voluntary Benefit Advisors

Building better benefits experiences together

Voluntary Benefit Advisors (VBA)

VBA provides premier enrollment solutions on a national scale and is an expert in enrollment solutions spanning close to 40 years collectively among the partners. With vast experience across multiple industries, VBA is a flexible partner and can devise an enrollment strategy that is sound and successful. They help brokers from coast to coast provide enrollment, technology solutions, and ongoing services to their clients.

PlanSource

More than 7.5 million consumers receive their benefits through the PlanSource platform, which provides the best experience possible for benefits communications, shopping, enrollment, billing, compliance and ongoing administration. We partner with leading brokers, carriers and tech providers to provide companies of all sizes with a complete solution for benefits administration.

Together

VBA and PlanSource provide customers with a unique blend of high-touch service, deep insurance and benefits expertise and state-of-the-art benefits technology. Our teams work hand in hand to enhance employee benefits management, deliver data analytics and wellness services, improve employee communications and provide a familiar benefits shopping experience.

PLANSOURCE®

VBA
VOLUNTARY BENEFIT ADVISORS

Why PlanSource and VBA?

- » **Personalization of Benefits** – Companies are expanding and diversifying their benefits to appeal to 4 generations in the workforce
- » **Mobile Shopping** – Employees expect a convenient and familiar benefits shopping experience
- » **Guided Self-Service** – HR teams expect smart software that guides them while giving them control of the process
- » **Ecosystem Connectivity** – HR teams expect benefits technology to easily integrate with HCM and carrier platforms
- » **Real-Time Information** – HR teams expect benefits data to be shared with key partners in real-time

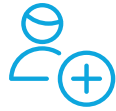
PlanSource and VBA Deliver What You Need To

- » Automate Processes
- » Engage Employees
- » Reduce Benefit Costs
- » Ensure Compliance

PlanSource Offers the Best Experience For



Benefits Shopping



Enrollment



Billing



Compliance



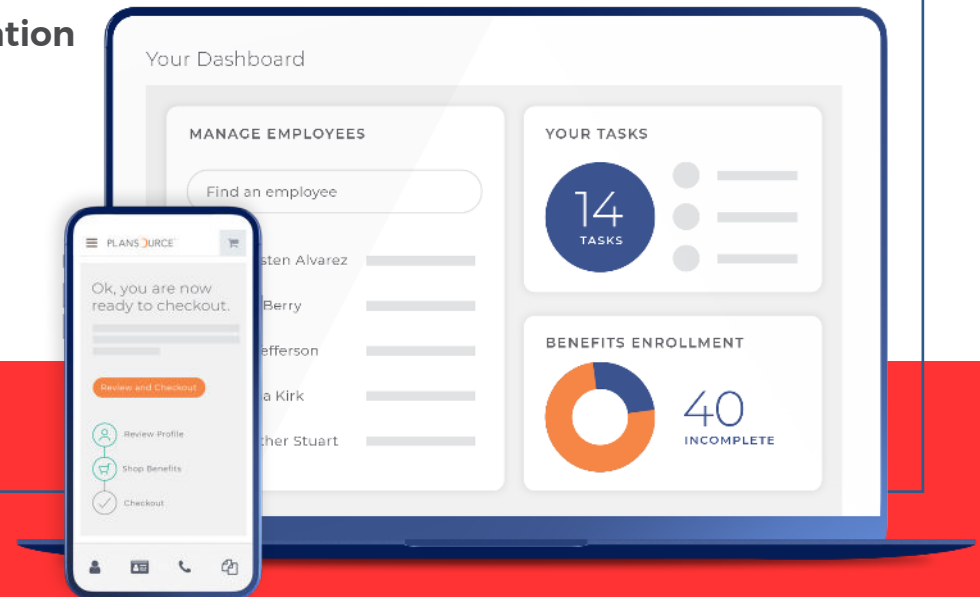
Administration

A Mobile-Friendly Employee Experience

Educational Videos and Content
Tailor-Made Recommendations
People-Friendly Experience
Shopping Cart and Checkout

Sophisticated Benefits Administration and Automation

Eligibility Management
Employee Communications
Cost Calculations
Flexible Reporting



PlanSource Boost

A groundbreaking program that provides organizations with industry-leading benefits technology and carrier API integrations that modernize the benefits experience for employees and HR teams.



Preferred pricing
when customers offer one or more Boost products



Employee shopping
experience optimized to drive engagement



Modern API
integrations that provide a real-time customer experience



Simplified self-billing
that eliminates the need to reconcile carrier bills