

PLANSOURCE

Not Your Average Voluntary Benefits

NEW OFFERINGS, INSIGHTS & TRENDS TO CONSIDER NEXT OE

Today's Panel of Speakers

**BOON
HEALTH**



Chris Henrichs
Co-Founder & Head of
Partnerships
Boon-Health

**GENOMIC
LIFE**



Nick Bellanca
EVP, Group Benefits
Genomic Life

**MAVEN
CLINIC**



Megan DiDomenico
Director, Channel
Partnerships
Maven Clinic

**METLIFE
LEGAL**



Loi Stoddard-Graham
VP, Product & Strategy
MetLife Legal

WHAT'S HAPPENING?



STRESS AS WE
"RETURN" TO WORK



EMPLOYEE NEEDS
CHANGING



PRESSURE TO KEEP
TOP TALENT



VB FOCUS FOR TOTAL
REWARDS

"To meet employee expectations and attract and retain talent, employers are broadening their voluntary offerings, to enable employees to create a package that works for their needs,"

Kim Buckey, VP client services at Birmingham

WHY DOES IT MATTER?



Talent retention



Brokers are recommending products that you haven't heard of

Questions to ASK

Will this new benefit fit your organization's culture?

Will it be useful in attracting and retaining a diverse talent pool?

Will it be utilized and valued? Will it support workers' well-being?

What is PlanSource Doing?



Introducing the Boost
Partner Marketplace



Expanding products to
personalize solutions for
our growing and changing
consumer base



Vetted Partner List, Quicker
Launches, No EDI Fees,
Billing Support

AUDIENCE POLL



POLL QUESTION #1

Which best describes
your current role?

TOPIC 1

2021 Employee Benefits Trends

Larger Companies Made More Changes To Their Benefits

Comparison of medium versus large companies

	ALL PLANSOURCE CUSTOMERS AVG SIZE 750 EEs	LARGER PLANSOURCE CUSTOMERS AVG SIZE 2,500 EEs
NONE/MINIMAL	65%	41%
MODERATE	31%	35%
SIGNIFICANT	4%	24%



Companies continue to invest in and expand their employee benefit programs

+6% YOY change

+7% 5-year change

Average Number of Benefits Offered

15.2

Average number of **benefits** offered by PlanSource customers

THE BREAKDOWN

Small Employers (<200) – 12

Medium Employers (201-999) – 18

Large Employers (1,000+) - 23

What did PlanSource customers spend on benefits per employee in 2020?

\$8,094

PER EMPLOYEE

\$675 PER MONTH
ACROSS ALL BENEFITS

AUDIENCE POLL



POLL QUESTION #2

Did you make any changes to your benefits offerings for the 2021 plan year?

TOPIC 2

Looking back over the last year

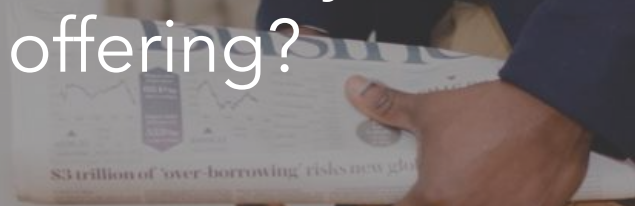


How has the last year changed
your position in the market?

In light of the last year, how has the market responded to your product offering?



How did the impact of the last year
change your product offering?




TOPIC 3

How employee benefits offerings are changing?



How did the impact of the last year
change your product offering?

A close-up photograph of two hands clasped together, one slightly larger than the other, set against a soft, out-of-focus background. The hands are positioned in the lower-left quadrant of the frame, with the fingers interlaced. The lighting is natural and soft, highlighting the texture of the skin and the veins on the hands. The overall mood is one of support, partnership, or agreement.

Did the last year change how HR teams
and employees look at voluntary benefits?

QUICK TAKE

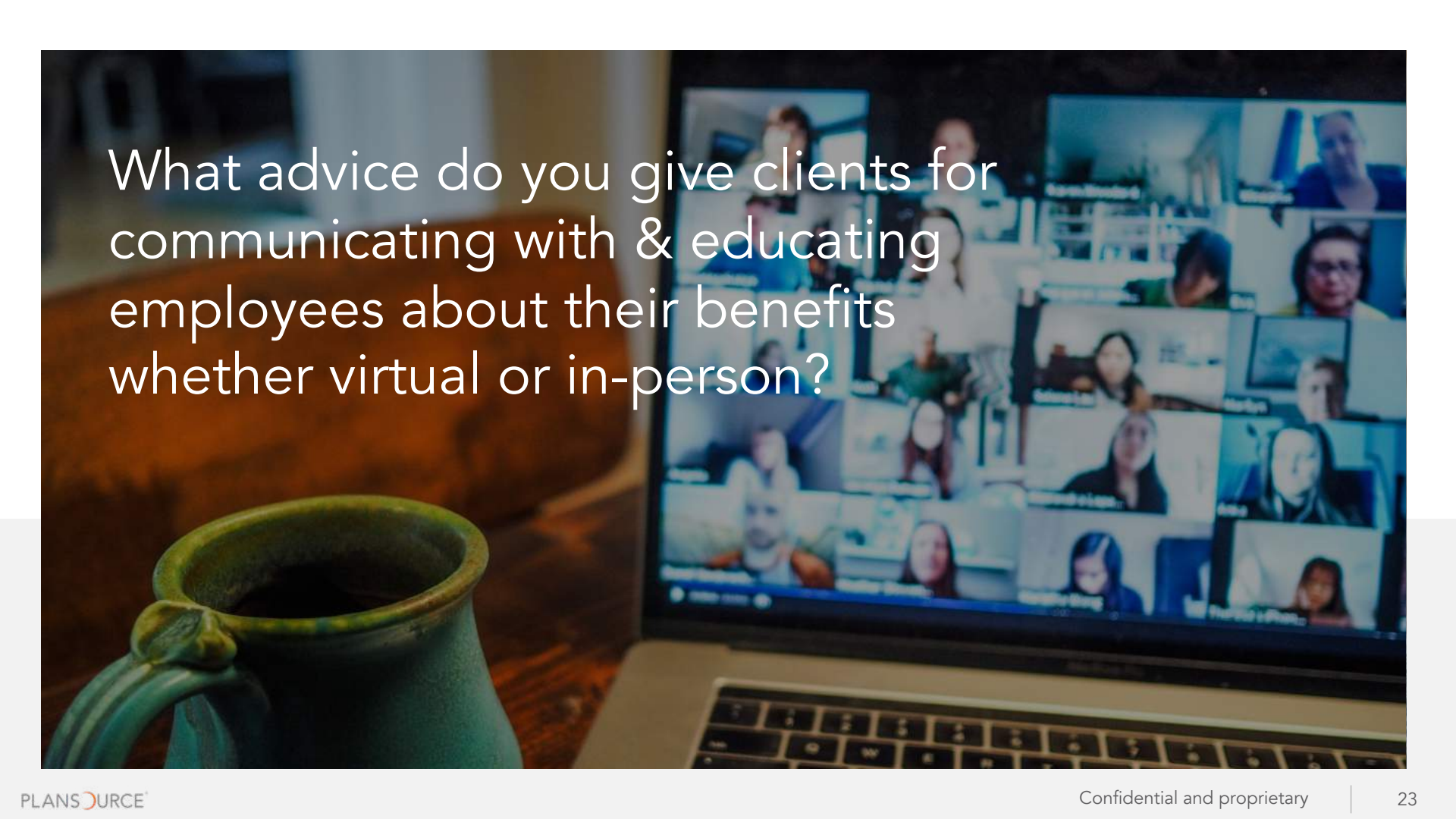
What's one positive
that's come out of
2020-2021 for you –
personally or
professionally?

TOPIC 4

Going back to work



What is your top focus now that employees are going back to work in the office?

A photograph of a laptop screen displaying a virtual meeting with multiple participants. In the foreground, a green ceramic mug is visible. The text is overlaid on the left side of the image.

What advice do you give clients for communicating with & educating employees about their benefits whether virtual or in-person?



What is your advice to brokers and HR teams that are finalizing benefits and/or preparing to go into OE?

AUDIENCE POLL



POLL QUESTION #3

Is your workforce back to work in the office—hybrid or full-time?

Q & A



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Thank You!