

# PlanSource Boost and Lincoln Financial Group

Working together to revolutionize the world of benefits



## Why Choose Lincoln Financial Group?

Employee benefits to help prepare a strong financial plan

Technology to improve the customer experience

Employee shopping experience that's optimized to drive engagement

Real-time API\* interactions that provide a modern customer experience

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

Preferred pricing when customers offer one or more Boost products

\*Future Development

PLANSOURCE

## Boost Integrations with Lincoln Financial Group:

### EOI INTEGRATION

Employees complete EOI questions within the benefits shopping experience

LIVE

### PLAN CONFIGURATION API

Automates the setup and renewal process, eliminating errors

FUTURE INTEGRATION

### ENROLLMENT API

Automates integration with Lincoln Financial Group, eliminating batch EDI files

FUTURE INTEGRATION

### MEMBER PORTAL

Seamless access to Lincoln Financial Group's member portal

FUTURE INTEGRATION

## PlanSource Offers the Best Experience For



Decision  
Support



Company  
Initiatives



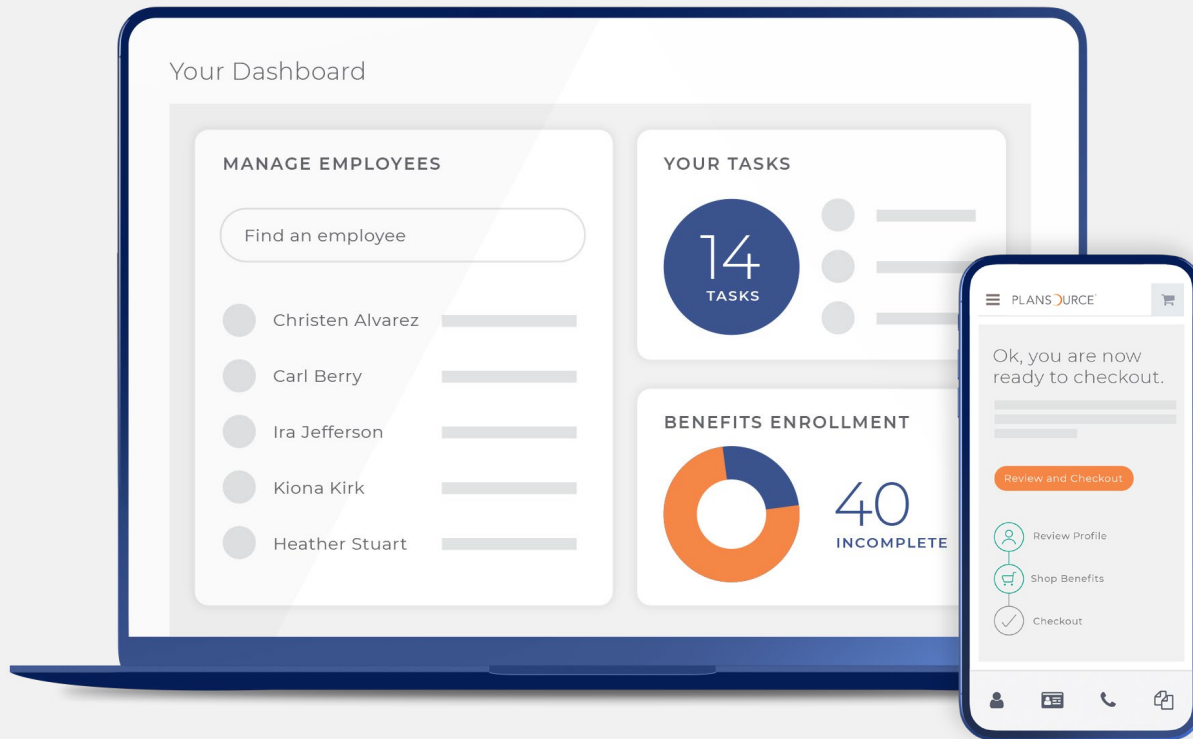
Employee  
Engagement



Carrier  
Integrations



OE and  
Guided Renewal



### The Source

An employer branded engagement application that connects employees to the entire benefits ecosystem and company news

### OE Experience & Guided Renewal

Eliminate manual processes and hours of admin work with true end-to-end benefits administration automation

### Decision Support

Shop and enroll in benefits and see personalized recommendations powered by DecisionIQ

### Company Initiatives

HR teams can drive their culture by showcasing company messages, benefits and initiatives