

# PlanSource and Brown & Brown: Building better benefits experiences together

## Brown & Brown Insurance

Brown & Brown, Inc. is one of the largest independent insurance brokerages in the nation. We provide risk management solutions to help protect what our customers value most. With more than 80 years of proven success, Brown & Brown is one of the industry's most powerful and influential leaders in the insurance industry.

EBTech is a team within Brown & Brown that specializes in the implementation and servicing of benefits administration software. Founded in 2012 in the Albany, NY market, EBTech now serves as a national resource to Brown & Brown that can deliver extensive experience and expertise in the benefits administration space. As a licensed reseller of PlanSource, EBTech implements all Brown & Brown clients on the platform from start to finish.

## PlanSource

More than 5 million consumers receive their benefits through the PlanSource platform, which provides flexible and intuitive software and services for benefits administration. We partner with leading brokers, carriers and tech providers to provide companies of all sizes with a complete solution for benefits shopping, enrollment, billing, compliance and administration.

## Together

Brown & Brown 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®



## Why PlanSource and Brown & Brown?

- » **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 Brown & Brown 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



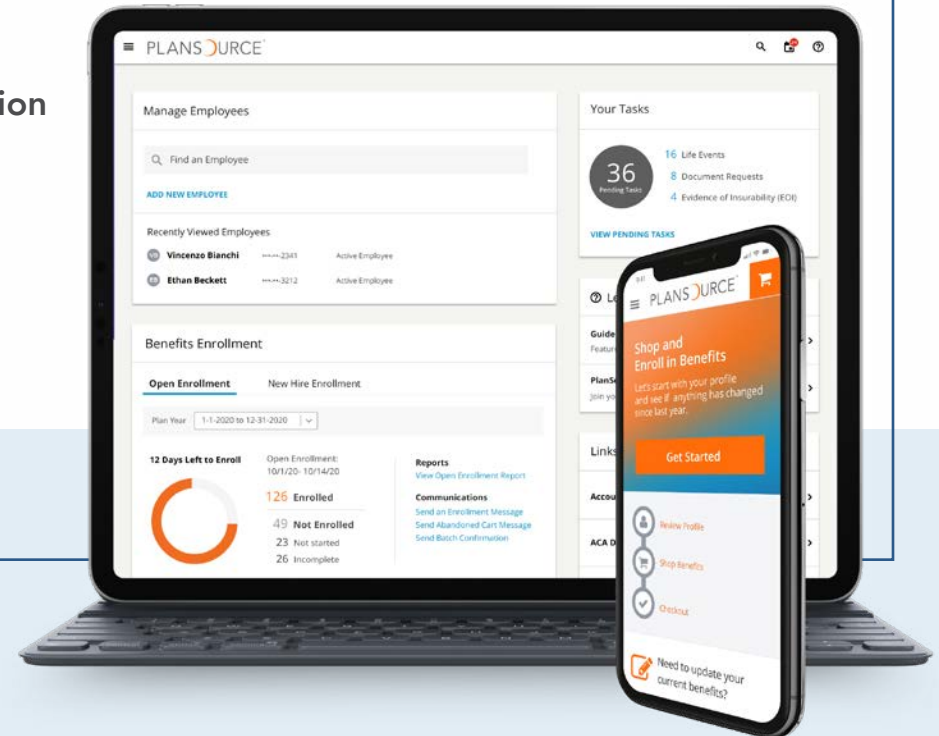
Administration

### 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 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