

# 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



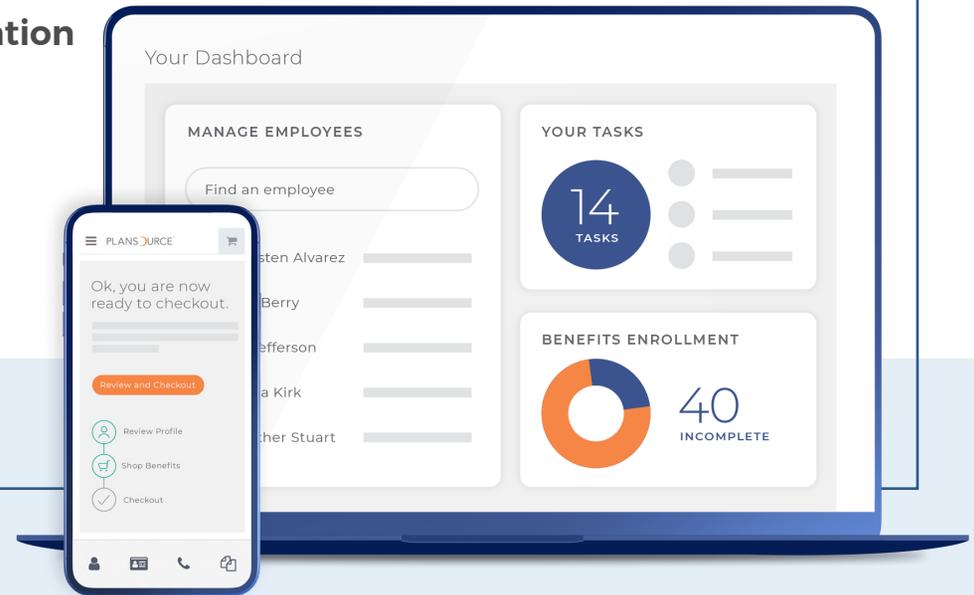
Administration

### 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