

PlanSource and WTW:

Building better benefits experiences together

WTW

WTW provides data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of their colleagues serving 140 countries and markets, they help clients sharpen their strategy, enhance organizational resilience, motivate their workforce and maximize performance. Working shoulder to shoulder with clients, they will uncover opportunities for sustainable success – and provide perspective that moves with clients.

PlanSource

More than 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

WTW 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.

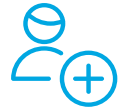
Why PlanSource and WTW?

- » **Save Time** – Automated and streamlined processes save HR teams weeks of time spent on administrative tasks and employee questions
- » **Automate Processes** – Modernize your benefits experience with powerful configurability that allows you to automate even the most complex rules and workflows
- » **Engage Employees** – Mobile-friendly tools and content simplify the process for employees, helping boost enrollments and empower better benefits decisions
- » **Ensure Compliance** – Manage complex federal, state and company-specific regulations with ease with defined workflows and automatic safeguards built into PlanSource
- » **Personalize Offerings** – Our flexible technology allows you to offer a diverse and expanding portfolio of benefits offerings needed to appeal to 4 generations of workers

PlanSource Offers the Best Experience For



Benefits Shopping



Enrollment



Billing



Compliance



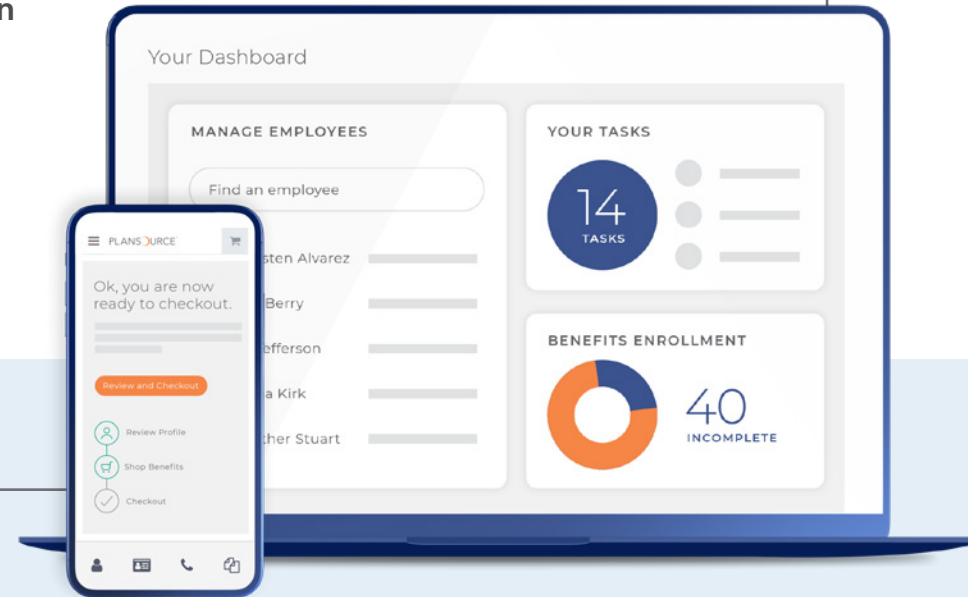
Administration

A Mobile-Friendly Employee Experience

- Self-Service Access
- Educational Videos and Content
- Personalized Recommendations
- People-Friendly Experience
- Mobile Shopping and Checkout

Sophisticated Benefits Administration and Automation

- Eligibility Management
- Employee Communication Tools
- Cost Calculations
- Flexible Reporting
- Ecosystem Integration



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