

Benefits Brokerage and Consulting Evaluation Checklist



Advanced Benefits recognizes that every employer has a unique set of business needs and priorities. Through an engagement with Advanced Benefits, we strive to bring your organization the knowledge, products and resources that will help you meet your needs and priorities.

Our team offers comprehensive employee benefits brokerage and consulting services to a wide spectrum of employers; small to large, private and public. A summary of those services is provided below. Use of this tool is intended to help you evaluate the offerings of firms you may be considering to take you to the next level of benefits excellence.

AB	Option 1		Option 2	
Yes	Yes	No	Yes	No

Service Team

Executive Advisor	Seasoned benefits professional with 5 to 20+ years of experience who stays actively involved in your account for the life of the relationship.	✓				
Account Manager	Tenured professional with expertise in all aspects of account administration.	✓				
Account Service	Licensed insurance professional who provides on-call administrative support for coverage, claims, eligibility and billing.	✓				
Wellness	Proven leadership in establishing or enhancing your corporate wellness strategy to maximize return on investment.	✓				
HR Support	Robust knowledge, experience, and depth of resources to help navigate compliance, policy development, management training.	✓				
Communications	Develop communications strategy, deliver print-ready design and copy, and employ communications technology platforms.	✓				
Actuarial & Analytics	Providing valuable analysis of carrier renewal proposals, reinsurance thresholds, target premium and COBRA premium validation. Analytic support for benefit modeling and claim forecasting. (100+ Employees)	✓				
Compliance & Reform	Affiliated with the one of the nation's largest and most prestigious employment and benefits law firms. PPACA Audits, regular updates.	✓				

Ongoing Strategic Counsel

Planning	Annual calendar for delivering superior, ongoing benefits consulting and brokerage services.	✓				
New Client Intake	Evaluate your total compensation strategy and benefit offerings and setting your strategic objectives for engagement.	✓				
Pre-Renewal	Renewal projections, evaluation of benefit needs and budget requirements. (100+ Employees)	✓				
Renewal	Comprehensive renewal presentation including marketing results, analysis and recommendations. (100+ Employees)	✓				
Education	Monthly webinars by subject matter experts from across the country. Frequent seminars and news alerts.	✓				
Benchmarking	Compare plans, costs, and trends against proprietary database of local, regional, and national plan sponsors.	✓				
Stewardship Reports	A comprehensive report of our service during the year, employee calls, rate negotiations, service reports and more.	✓				
Performance Guarantees	Subjective performance guarantee of 10% of annual compensation (100+ Employees)	✓				