



## Scope of Services

For

Employer Name

It is the intention of R&R Insurance Services, Inc. to provide the specific services as outlined below for the Employer Sponsored employee benefits programs. This arrangement is assured over the policy term, and is sustained by the compensation arrangement previously disclosed in this Agreement. The Services in this agreement include, but are not limited to:

### Strategic Planning / Marketing

- Develop near-term and long-term benefit and health management strategies with Client leadership
- Market evaluation (all lines as needed and mutually agreed upon)
- Bidding/negotiating for employee benefit coverages and related vendor services
- Comparative proposal (all lines)
- Recommendations
- Contribution modeling

### Health Management/Wellness

- Wellness plan design
- Coordination of biometrics screening and/or other wellness program vendors
- Review of aggregate biometrics screening report/benchmarking
- Onsite visits to go over the results of biometric screening and recommend wellness strategies

### Compliance/HR Support

- Legislative support
  - Identify and advise on basic federal notice and disclosure requirements that apply to group health plans and/or employees under various employee benefits and employment laws
  - Monthly newsletters and breaking news alerts
- Annual Compliance Review
- Human Resource support tools
  - Access to R&R/Zywave *Benefits Client Portal*, webinars, and updates
- Access to Assurex Global Partners' programs (including free monthly compliance webinars)

### Reporting

- Monthly claims analysis reporting
- Plan design analysis and benchmarking

### Account Management /Service

- Assist in bringing resolutions to questions and issues that are identified by Human Resources Team
- Conduct open enrollment meetings and prepare employee communications
- Assist employees with benefits questions and claims concerns
- Day-to-day support
- Medicare Consulting Services

NOTE: The stated fees do **not** contemplate the following: COBRA administrative services; Flex/Section 125 administrative services; ERISA Plan Document Administration services; Form 5500 filing preparation services; electronic enrollment platform/services such as *Employee Navigator*; enrollment decision support platform/services such as *ALEX*; FMLA administrative services such as *Leave Solutions*; or any special audit or actuarial services that may be required.