

Remind clients why you're their broker

Competition among insurance brokers intensifies in down markets. Value-added services can mean the difference between client retention and attrition.

The Compliance Advisor Service is an easy, effective and economical way to create a lasting competitive advantage for your sales team. We provide ongoing, best practice regulatory expertise via a variety of tools and resources that will arm your clients and prospects with the knowledge they need to stay compliant.

Every communication is customized with your brokerage's logo and contact information, continually reminding your clients and prospects that you have their best interests at heart.

For an average of \$.05* per client communication, you can:

- Strengthen existing client relationships
- Convert prospects into customers
- Create an ongoing communication that requires virtually no effort or maintenance on your part

What's Included?

The Compliance Advisor Toolkit provides compliance and regulatory expertise via five easy-to-use formats:

1) Bi-monthly Bulletins

Our bulletins keep your clients informed of new and breaking legislation from key federal departments and agencies, including the IRS, DOL, CMS and EEOCC. Each is customized with your brokerage's logo and contact information. You are then free to send it to as many clients and prospects as you like. Recent topics include: *"COBRA Subsidy Provisions, FMLA Final Regulations and HIPAA Privacy & Security Changes under ARRA."*

2) Bi-monthly FAQ Newsletters

Our legal experts receive countless emails from employers with compliance questions, issues and concerns. Most inquiries we field are top of mind for all employers. We have compiled the most useful questions & answers into this bi-monthly, FAQ newsletter. Each FAQ Newsletter is housed in the Online Resource Center. A notification email is sent to broker clients when a new FAQ Newsletter has been released.

3) Quarterly Webinars

Webinars address current compliance and regulatory issues, as well as the most important HR and benefits topics and are open to both your clients and prospective clients. They are hosted by a legal expert with 20+ years experience in compliance/regulatory matters and include a helpful "Ask the Expert" segment. Sample topics include: *"Roadmap for Compliance with COBRA Subsidy Provisions included in the Stimulus Act."*



What's Included? *Continued*

4) **Quarterly Compliance Guides**

These guides provide strategic direction on a variety of timely health and welfare topics. Use them to help shape clients' long-term compliance, HR and benefits strategies. As with all our communications, each guide is customized with your brokerage's logo and contact information. Sample topics include:
"Be Wary of ERISA Plan Application to Voluntary Worksite Products: The Safe Harbor Defined."

5) **Online Resource Center**

The Online Resource Center is for our broker clients only. It serves as a central repository for all Compliance Advisor tools and information and is accessible 24/7. Brokerages can search our full digital compliance resource library and download content to distribute to their clients and prospects. The Center includes:

- Bi-monthly Bulletin archive
- A consolidated FAQ section, each FAQ Newsletter is arranged by topic
- Presentation slides from Quarterly Webinars
- Links to free online benefit resources and frequently requested HR forms

How Much Does A Subscription Cost?*

Subscription prices allow for unlimited distribution to all your clients/prospects for a flat annual fee. The fee is based on your brokerage's gross annual revenues. For most of our clients, this equates to a cost of about a nickel per individual client communication.

Gross Annual Revenue	Annual Fee
< \$2M	\$1800
\$2-5M	\$2800
> \$5M	\$3800

Why Focus on Compliance as a Retention Tool?

Staying compliant is a fundamental challenge nearly every employer faces. For those without in-house expertise, interpreting the massive volume of legislative changes and regulatory updates has become a costly headache, as well as a drain on HR resources.

The Compliance Advisor service provides expert guidance on today's most significant regulatory topics. All communications are written in easy-to-understand language and include action plans so your clients know when and how to respond. With Compliance Advisor, you'll not only help your clients navigate the complexities of compliance, but also regularly remind them why they chose you as their insurance broker.

Please contact sales@compliance-advisor.com or call 877.823.6636 to learn how **Compliance Advisor** can increase your brokerage's sales revenue. For more information, please visit our website at www.compliance-advisor.com