

# About ABD

## Servicing Clients of all Stages and Sizes

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Start-up



Emerging



Fast Growth

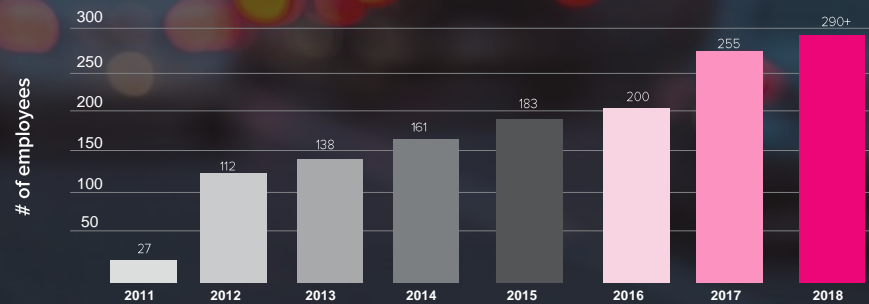


Fortune  
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### Services Offered

- Property & Casualty
- Executive Risk Solutions
- Employee Benefits
- Retirement Services
- HR Services
- Private Client Services

### Company Growth



### Key Facts

- 9 offices in CA, WA and IL
- Specializing in **14 industry verticals** (Tech and Life Sciences)
- **85** Net Promoter Score
- **Top 25** Employee Benefits Practice in US
- One of the nation's **largest privately owned firms**
- **Best Places to Work** (2013-2018)

# ABD Services

## ABD Connect

ABD Connect is a customized secure channel to your ABD program. It allows you to view your policies, communicate with your ABD team, and share files securely. With ABD Connect, the future is here.

- See important benefit plan info at a glance and access finalized plan documents
- Leverage HR support tools for the latest HR news, forms and training.
- Share information securely with your ABD team; census data, M&A documents, new program designs
- Stay in compliance. Access ABD seminars and monthly compliance alerts in real time.

## ABD HR On-Demand

HR On-Demand provides a valuable resource to support and enhance your current internal HR efforts. You are provided unlimited HR consulting services including but not limited to:

- Free Quarterly Harassment Prevention Training
- Custom Employee Handbooks
- Custom Job Descriptions and HR Documents
- HR Concierge Live Chat Assistance

## ABDAnswers for Employees

This program is available to all employees and covered dependents. It is a service designed for employees to obtain confidential assistance from benefit experts. The ABDAnswers team is able to provide your employees with prompt, knowledgeable answers to all their benefits questions by phone or email. ABDAnswers services include but are not limited to the following:

- Online benefit enrollment support
- ID card requests
- Qualifying life event and open enrollment support
- Benefit clarification and education
- Claims advocacy

Our experienced team of professionals is available Monday through Friday. 8:00 am to 5:00 pm.

# ABD Services

## ABD Mobile Benefits

Our seamless mobile app allows employees to easily access and connect to their benefits information in just a few taps of their fingertips. Empower self service resolution with a simple, user-friendly interface that can be accessed anytime, anywhere. With ABD Mobile Benefits you can:

- Connect to ABDAnswers. One-touch access to a benefits specialist to help with employee questions.
- Store ID cards in one, easy to access, location
- Quick access to your benefits handbook, guide, and open enrollment information.
- View average cost of procedures by zip code.
- Find network providers.
- Can enable text push notifications to drive engagement and increase awareness.

## Communication Materials

Below are some of the value added services we would provide over the course of the year as your strategic business partner. ABD will provide:

- Employee Wallet Cards
- Benefit booklet content and design
- Open enrollment communications content and design of newsletter, announcement and presentations
- Health Fair planning
- Benefits web portal for employees

## Compliance

To address the increasing regulatory and compliance demands on Health and Welfare programs, ABD has established a compliance department dedicated to delivering compliance services. These services include but are not limited to:

- Review of Plan Documents and Contracts
- Federal and State COBRA, HIPAA, FMLA Compliance
- Affordable Care Act consulting and strategies including cost impact and options in conjunction with the Technical Services Team
- Section 125 and Flexible Spending Accounts Discrimination Testing
- “ABD Office Hours” Compliance Webinars
- Annual 5500 filings along with preparation of SAR’s and SMM’s
- Timely Compliance Alerts – updates and guidance on relevant compliance related topics

# ABD Clients that Demand Results

