

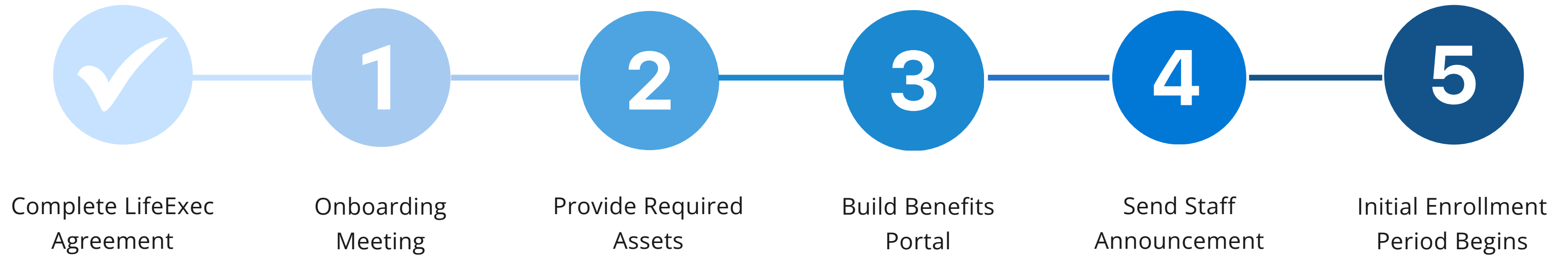


# LifeExec Advantage Onboarding Plan

Get started with LifeExec in 3 easy steps

# TIMELINE

A quick look at your path to enrollment with LifeExec



**1**

## **100% Voluntary**

Zero Cost to Employer

100% payroll deduction for benefit elections.  
LifeExec provides an employee discount.

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**2**

## **Fixed Stipend**

Fixed \$ Per Employee

Offer a standardized cost- share to help employees get the benefits they need.  
\$5, \$10, \$25

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**3**

## **Sponsor Programs**

Reward Your Team

Boost recruitment and retention: sponsor one or more employee benefits packages.

# Step 1: Customize Your Program

**BUILD YOUR BENEFITS  
PROGRAM**



First Name	Last Name	E-mail	Mobile Phone

# Step 2: Send Employee Directory

**You provide an employee database and we do all the work - build your website, create the enrollment campaigns, educate, and enroll.**

**DOWNLOAD EMPLOYEE  
DIRECTORY TEMPLATE**

CONFIDENTIAL DATA

*Employer agrees to the terms and conditions contained in the LifeExec Terms of Use and end user licensing agreement (EULA) which can be found during registration, on LifeExec.com, and within each user account. LifeExec does not share or resell end user data.*

\*If you are sponsoring employees, we need more information and will reach out to you after your benefit election form is complete.



# Step 3: Complete ACH

**All benefit elections, sponsored or voluntary, are consolidated into a single monthly billing statement. Employer is responsible for the total monthly payment by ACH. The payment process must be set up prior to the initial onboarding or submission of employee benefit elections.**

**COMPLETE ACH  
INFORMATION**

# Your Onboarding Checklist

Required assets must be submitted by Monday, 3/25.

Submit Benefit Elections

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Send Employee Directory

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Complete ACH

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Once our team receives the required assets, we'll reach out with more information about our enrollment process.