# EMPLOYER GUIDE Working With LifeExec

Cultivating a strong company culture through robust benefits packages can lead to significant returns - increased retention, improved recruiting, and also in reinforcing brand identity. By fostering a positive and caring environment, your team members will naturally embody that same spirit, translating into exceptional interactions with clients and further elevating your business's success.

Business Program Overview Launch Your Company Enrollment Process Long Term Partnership Resources



# LIFEEXEC BUSINESS PROGRAM BUSINESS PROGRAM OVERVIEW

# Top 10 Benefit Company

When you offer LifeExec benefits to employees, you're offering one of the top-rated benefit programs in the US.

Every benefit is tested and every provider delivers best-in-class to a nationwide clientbase of millions.

# Available To All Employees

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Every benefit is tested and every provider delivers best-in-class to a nationwide clientbase of millions.

# Enterprise-Grade Package & Service

Every LifeExec Business Program comes complete with:

- Branded Enrollment Website
- Quarterly Enrollment Campaigns
- Breakroom Fliers & Handouts
- Live Employee Support
- Monthly Enrollment Reports
- ACH Billing

# Zero Risk Business Program

LifeExec is an easy employer decision because we make it a 100% Win-Win for you and your employees.

LifeExec's Business Program has \$0 company cost, no minimum commitment levels, and you can cancel without penalty after 90-days.

# Launch in Just 30 Days

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### Be Part of an Important Mission

Did you know 120 million Americans lack adequate healthcare? At LifeExec, we believe that everyone deserves affordable healthcare, without any restrictions. That's why we offer a unique health membership that provides individuals, families, and businesses with truly affordable benefits.

# WORKING WITH LIFEEXEC

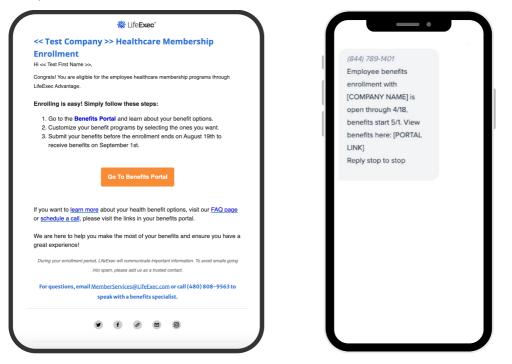
# Step 1: Complete Onboarding

- 1. Attend Onboarding Meeting
- 2. Submit Required Assets
- 3. Send Notification to Team Before Launch

### **Step 2: Initial Enrollment Period**

Your initial enrollment kicks off your partnership with LifeExec. LifeExec communicates with your team to provide information about benefits.

Example Email and SMS



### **#1** Tip for Successful Enrollments

Our team is committed to keeping you informed and providing additional announcements during the enrollment period that you can use to encourage employees to sign up for LifeExec benefits.

We have observed that enrollments are most successful when employers or businesses take an active role as champions of the benefits. Your support and promotion of LifeExec benefits can greatly increase participation and engagement among your employees.

# WORKING WITH LIFEEXEC

### **Step 3: Approve Enrollment Report**

Once your initial enrollment period is completed, LifeExec will send you an enrollment report. It is important to note that **your team has a deadline of two business days to review and approve the report**. Please keep in mind that LifeExec does not have the capability to make any changes to the report after this two-day window has elapsed.

FIRST	LAST	PHONE	EMAIL	DOB	LIFEEXEC ESSENTIAL	LIFEEXEC MENTAL HEALTH	LIFEEXEC PROTECT	LIFEEXEC SIGNATURE INDIVIDUAL	LIFEEXEC SIGNATURE FAMILY	LIFEEXEC PREMIUM INDIVIDUAL	LIFEEXEC PREMIUM FAMILY	TOTAL MONTHLY PRICE		EMPLOYE	MTHLY PAYROLL EDUCTION	START DATE
/lember	LifeExec	640-000-000	Lifeexecmember@gmail.com	1/1/1990	\$ 24.95			\$ 54.95				\$	79.90	\$-	\$ 79.90	
												\$	-	\$-	\$ -	
												\$	-	\$-	\$ -	
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												\$	-	\$-	\$ -	
												\$	-	\$-	\$ -	
												\$	-	\$-	\$ 	
											TOTAL	\$	79.90			

Enrollment Report Example

## Step 4: Setup Payroll Deduction With Your Payroll Company or Team Member

- 1.Send the approved enrollment report to your payroll company or in-house staff responsible for payroll. The report includes instructions and our contact information for any queries they may have.
- 2. Your payroll company will return the employee benefit contributions to your bank account.
- 3. We will charge you via ACH for the total monthly amount. This eliminates the need for monthly administrative work, as the ACH payment will be automatically deducted from your bank account.
- 4. You will receive the invoice via email from the address: <u>quickbooks@notification.intuit.com</u>.
- 5.LifeExec will process the invoice amount via ACH using the account details you provided from 541 Software (dba LifeExec) the first week of the month.

Deductions are post-tax and should be taken from the first paycheck of the month.

This process ensures accurate accounting of employee benefit contributions and relieves you of monthly administrative tasks. We handle all the necessary backend work so you can focus on managing your business.

## **Stipends & Sponsored Enrollments**

 If the employer has provided any form of stipend or sponsored benefit, they are accountable for ensuring the relevant expenses are properly accounted for and allocated.

# WORKING WITH LIFEEXEC Long-Term Partnership

#### **2024 ENROLLMENT SCHEDULE**

All businesses will be included in LifeExec's mid-year and end of year enrollment period.

#### **MID-YEAR ENROLLMENT**

#### **END OF YEAR ENROLLMENT**

June 4-18, 2024 Benefits Start July 1, 2024

November 13-December 17, 2024 Benefits Start January 1, 2025

#### ADDITIONAL ENROLLMENT OPPORTUNITIES

Contact MemberServices@LifeExec.com if you'd like to be included in an additional enrollment period.

- January 4-21, 2024
- February 1-20, 2024
- March 5-19, 2024
- April 2–19, 2024
- July 1–19, 2024 May 1-20, 2024
- June 4–18, 2024
- October 1–18, 2024
- July I-19, 2024
   August 1-20, 2024
   November 13-
- September 3-20, 2024 December 17, 2024

#### Benefits Start the 1st of the Following Month

# **New Employees**

#### Employers have two options when it comes to new employees:

- 1. Employee enrolls during your next enrollment period.
- 2. Employer shares benefit portal during onboarding. The employee can self enroll at anytime.

# **Terminating Employees**

- Please note that terminations must be submitted to MemberServices@LifeExec.com prior to the 24th of the month (or the Friday before) in order to apply for the following month.
- Employee benefits will continue until the end of the month, but will be terminated on the 1st of the following month.
- Employee completes our termination form.

#### TERMS & CONDITIONS: BENEFIT CANCELLATIONS AND REFUNDS

Benefit elections are paid month to month. Benefit elections can be cancelled at any time without penalty. Once a benefit enrollment has been submitted, the benefit member is enrolled in their benefit(s) for the subsequent month until the benefit cancelled and processed. Cancellation requests received and processed before the 24th of the current active month terminate the benefit election during the current month. Cancellation requests received and processed after the 24th of the current month terminate the benefit at the end of the subsequent month. Payment for the following month is required. Benefit cancellation requests can be processed electronically or submitted to memberservices@LifeExec.com. No refunds, partial or total, are available within an active benefit month.

# **Resources**

Click on the buttons below to access additional resources.

# **Employer Resources**

#### **Contact Information**

Billing: prucobo@lifeexec.com

Additional Contact: MemberServices@LifeExec.com

**Business FAQ** 

**Benefits Flier** 

# **Employee Resources**

#### Contact Information

Email: MemberServices@LifeExec.com

Phone: (480) 808-9563

**Benefits FAQ** 

**Cancellation Form** 

#### **Speak With a Benefits Specialist**

Schedule a call with a member of LifeExec to learn more about your benefit options.

Thank you for being a valued partner of LifeExec.