

IGOE ADMINISTRATIVE SERVICES

IGOE

PARTNERSHIP OVERVIEW

WHERE SERVICE MATTERS!



WHO IS IGOE?

- Founded by Mike Igoe in 1977
- Located in San Diego, CA
- Privately owned and capitalized
- Began providing FSA services in 1990, COBRA in 1999, HSA in 2014
- Operated by an executive management team of employee owners
- Organically grown solely through the strength of partner referrals
- Committed to a partnership based business engagement model



Experience...over 200 years of it within the ownership team alone!



Technology...we partner with the leading technology providers to provide all of the bells and whistles to maximize administrative efficiency.



Relationship-Driven...every client has a SINGLE dedicated point of contact!

WHY OUR CLIENTS ARE RAVING:

- Dedicated client service contacts assigned to all clients, regardless of size
- Client Retention Rate of 90%
- 10% growth year over year
- Serving over 50,000 spending account members across all 50 states
- 95% live call handling rate

HAVING A PERSON
YOU CAN CALL -
WHO KNOWS YOU
AND YOUR
ACCOUNT - CAN
MAKE ALL THE
DIFFERENCE IN
GETTING AN ISSUE
RESOLVED.

OUR MISSION

IGOE IS AN EMPLOYEE OWNED, CUSTOMER-DRIVEN COMPANY. OUR MISSION IS TO PROVIDE PERSONALIZED SERVICE RESULTING IN LONG-TERM PARTNERSHIPS.

WE ACHIEVE OUR MISSION BY WORKING AS A PART OF OUR CLIENT'S TEAM; BY MEETING SERVICE COMMITMENTS ACCURATELY AND ON TIME AND BY REMAINING ACCOUNTABLE.

OUR COMMITMENT TO TEAMWORK SHINES THROUGH OUR RECOGNITION OF AND RESPECT FOR ALL OF THE INDIVIDUALS INVOLVED IN THE SERVICES WE OFFER - EMPLOYERS, PARTICIPANTS, BROKERS AND OUR OWN EMPLOYEES.

AT IGOE, **INTEGRITY** IS PARAMOUNT. WE DO WHAT WE SAY WE WILL. PERIOD.

SIMPLY STATED – WE EXIST TO PROVIDE QUALITY SERVICE TO OUR PARTNER-CLIENTS WHILE ALSO PROVIDING SUPERIOR QUALITY OF LIFE TO OUR PARTNER-EMPLOYEES.



INTEGRITY IS
THE BASIS OF
EVERY IGOE
PARTNERSHIP.

PARTNER COMMITMENT

WE ARE COMMITTED TO OUR **CUSTOMERS** - WE EARN THE LOYALTY OF OUR CUSTOMERS THROUGH LISTENING, ANTICIPATING NEEDS, AND ACTING TO CREATE VALUE.

WE ARE COMMITTED TO OUR **EMPLOYEES** - WE ENCOURAGE AND REWARD INNOVATIVE THINKING, SUPPORT WORK-LIFE BALANCE, AND INVEST IN THE DEVELOPMENT OF OUR EMPLOYEES THROUGH EDUCATION AND TRAINING.

WE ARE COMMITTED TO OUR **COMMUNITY** - WE PROVIDE ADMINISTRATIVE SOLUTIONS THAT HELP LEVERAGE OUR BUSINESS PARTNERS AND IMPROVE THEIR BOTTOM LINE.

SIMPLY STATED...WE ARE COMMITTED TO IMPROVING THE LIVES OF THOSE AROUND US: EMPLOYERS, PARTICIPANTS, BROKERS AND EMPLOYEES



SERVICES

- COBRA
- DIRECT BILLING (RETIREE, LOA & MORE)
- PREMIUM ONLY PLAN DOCUMENTS
- COMMUTER BENEFITS
- HRA
- FSAS (FULL & LIMITED HEALTH FSAS)
- DEPENDENT CARE ASSISTANCE PLANS
- HSA
- NON-DISCRIMINATION TESTING

WHAT'S INCLUDED AT A GLANCE*

- Dedicated Client Manager
- Multi-year fee guarantee
- Service Guarantee
- On Site Call Center
- EDI Development
- Real-time system portals (employer and participants)
- Mobile App (FSA/HRA/HSA/Commuter)
- Employer Training
- Open Enrollment Processing
- Plan Documents (including SPD)
- Annual Non-Discrimination Testing
- Online Enrollment and Payment (COBRA)
- Stacked Benefit Cards
- Direct Deposit

*Full service details are listed in the Fees Overview for each product offering



Implementation Timeline

Sample 60-day schedule with key benchmarks at a glance

60 DAYS OUT FROM EFFECTIVE DATE

- Review, sign and initial contracts to begin your implementation
- Schedule an Introduction Call and, if desired, ongoing bi-weekly touch point calls

45 DAYS OUT

- Complete online configuration workbooks with plan design and banking information
- Schedule configuration review set-up
- Discuss timing of COBRA member take-over mailing
- EDI discussions begin with vendor partners

30 DAYS OUT

- COBRA take-over data due (weekly updates are generally required)
- COBRA take-over letters are mailed
- Start spending account enrollment process
- If applicable, Spending Account takeover demographic data due (for ordering of benefit cards)

15 DAYS OUT

- EDI testing should be in process
- Spending Account enrollment data due
- Final COBRA takeover data due
- Cafeteria Plan Documents and SPDs Available on iView
- Remaining benefit cards ordered
- Implementation calls transition to client training calls