

PLAN ADVISOR



Benefit Account Planning For Employers and their Employees!

One way to attract and retain employees is by offering benefits they want. TASC's industry exclusive Universal Benefit Account® offers a wide variety of benefit accounts to help employers create an attractive and competitive benefits program. To help our clients navigate these options, our dedicated Plan Advisor team is ready to guide every step of the way.

Plan Advisor is an important component of TASC and is only possible due to our development of the Universal Benefit Account. When combined, Plan Advisor and Universal Benefit Account help clients maximize their benefits. With this combination, nobody in the industry can come close to what TASC offers.

After gaining a thorough understanding of the client's current benefits and their challenges for the future, TASC advisors will recommend appropriate account offerings and then help implement these accounts. Advisors do not sell additional services; this is a free, consultation-focused service intended to help clients achieve their goals.

Client Benefits

- Access to experts on employee benefit account configuration, attributes, features, and uses.
- Free consultation and needs assessment to build a plan to meet employee benefit goals.
- Assistance in choosing the appropriate accounts and features and building a plan for the people who matter most, the employees.
- Access to case studies showing how employers have designed their benefit plans to meet their needs.

Create a Benefit Account Plan Together



UNDERSTAND

Understand the client's business and employee goals and challenges.



LEARN

Help the client understand the accounts available and how they will help them meet their goals.



DESIGN

Create a plan with the client to meet their goals for today and tomorrow.

To learn more, visit www.tasconline.com, or call 888-595-2261, press 1 "For employers wanting more information on TASC offerings," and then press 1 again "To speak to a Plan Advisor regarding adding a new account to your Universal Benefit Account."