

Announcing Our UBA Partnership!

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While many of our competitors have chosen to sell to larger publicly held companies, we want you to know that Sullivan Benefits is committed to remaining independent. We believe that we can provide greater value to our clients as decision makers that drive strategy, decide on the levels of support and the services that we provide; as an independent entity. It is for that reason that we have joined [United Benefit Advisors](#) (UBA) an exclusive partnership of 140 the nation's leading independent employee benefit advisory firms. ***So, what exactly does this mean for our clients? Great question!***

UBA allows organizations like ours to maintain our independence share and leverage our collective experience, expertise and market presence in order to provide best-in-class services and solutions to our clients. "This new partnership is one of the *best* things we have done for our clients, and they don't even know it yet", was the message Co-Owners Chrystine Heier and Gary Goodhile came back with after spending 3 days in Chicago at the annual UBA Spring Meeting.

Collaboration of the Like-Minded

As is the case with most everything, two heads are better than one when working to come up with a solution. Our industry is going through a period of dynamic change, having the opportunity to openly collaborate with other business owners that are faced with similar challenges (or as we view them opportunities) will only improve our ability to continually enhance the value that we provide to our clients. As a member of UBA we now have 140 partner firms nationwide that employ 2,200 other benefit professionals, representing what collectively amounts to the 5th largest block of employee benefits business in the country to share information, intellectual capital and best practices with.

Exclusive Resources

United Benefit Advisors Health Plan Survey

One of the most valuable resources we now have access to is the annual United Benefit Advisors Health Plan Survey. With over 16,000 plans representing all industries, this survey contains the most extensive benchmarking data available to employers (much larger than the Mercer and Kaiser surveys combined). As a UBA partner we load our book of business' data into the survey each year right around this time and receive the results in the August timeframe.

Benchmarking allows us to identify areas of concern, but also areas of opportunity. The survey will help to more accurately depict the competitiveness of each client's medical costs, contributions, and plan designs down to their exact industry and State.

Compliance Support

Do you have a compliance question that needs to be answered now? We know that the answer is typically, yes, and at times a lot of them. As a UBA partner firm we have access to a great deal of additional compliance support, resources and materials, as well as a full-time ERISA attorney who is solely responsible to field compliance related questions from UBA partner firms.

Preferred Relationship with Vendors

Our block of business with select carriers will be aggregated with other UBA firms'. Advantages will come in the form of preferred status, preferential underwriting, exclusive offers, and much more. In



addition, there are many UBA “certified solutions” providers that will enable us to plug into many additional service offerings at deeply discounted fees.

Three Partner Firm Meetings Per Year

There are three formal UBA meetings per year that will allow members of the Sullivan Benefits team access to great speakers, formal training programs, networking opportunities, industry news, product updates, and much more!

Stay Tuned!

There will certainly be more to come and we very much look forward to sharing more about the UBA relationship at our next meeting with all! As always, feel free to reach out to any member of the [Sullivan Benefits Team](#) with any questions you may have!