

## **Session**

### **The Role of Voluntary Benefits**

#### **Moderator**

**Kate Buch**

Finance Director

Town of Darien, Connecticut

#### **Speaker**

**Jeff Johnson**

Senior Vice President, Segal Co.

- I. Defining voluntary benefits
  - a. Brief history
  - b. Current context
- II. Employee events and the government, individual, and employer programs that cover them.
- III. Compliance overview
- IV. Non-ERISA vs. ERISA
- V. How employers use voluntary benefits
- VI. How to implement a strategy
  - a. Market research
  - b. Plan design
  - c. Getting employees to use the plan
  - d. Underwriting
  - e. Premium collection
  - f. Claims procession
  - g. Monitoring and reporting
- VII. Advantages
  - a. Lowering expenses
  - b. Better oversight
- VIII. Customized plan designs