



Broker and Employer Financial Incentives

Broker Bonus

- \$100 per employee enrolled in any Fixed Funding Solutions plan

Implementation Credits

- Small group Fixed Funding Solutions employer transition credit of \$100 per enrolled employee
- Large group Fixed Funding Solutions transition credit of \$150 per enrolled employee

Surplus Guarantee

- Guaranteed minimum surplus amounts based on employees enrolled in any Fixed Funding Solutions product at the end of the plan year:

10 – 14 enrolled employees = \$1,500 minimum surplus

15 – 24 enrolled employees = \$ 2,000 minimum surplus

25 – 50 enrolled employees = \$5,000 minimum surplus

51 – 100 enrolled employees = \$8,000 minimum surplus

Example: A 13-life group with an November 2021 effective date realizes a \$1,000 surplus at the end of their plan year. This group would be credited an additional \$500.