



EMPLOYEE ANNUAL BENEFITS CHECKLIST

PERSONAL & FAMILY INFO

- Update address and contact info
- Confirm dependents
- Update beneficiaries

COST & BUDGET

- Review paycheck deductions
- Estimate yearly costs
- Ensure plan fits budget

MEDICAL PLAN

- Compare plan options
- Check deductible & out-of-pocket
- Confirm doctors in-network
- Review copays

SAVINGS OPTIONS

- Enroll in HSA/FSA
- Set contribution amounts

PRESCRIPTIONS

- Check medications covered
- Review generic vs brand pricing
- Look at mail-order options

PROTECTION

- Review life insurance
- Check disability coverage
- Confirm beneficiaries

FINAL CHECK

- Coverage meets needs
- Family protected
- Understand how to use benefits