



*Empowering BenefitsPros On Their Terms*

## **National CorePartner Program Overview**

The modern way to brand, position and differentiate with BenefitsPros

### **It Takes a Village • Our Harmonized Team**

EBHub and Exclusive Category CorePartners collaborate to better serve BenefitsPros

- A 365/24/7 showcasing of best-of-breed services and products ▪



### **Coordinated With The FusionPowered Dashboard for BenefitsPros**

*Fusing new tech, services, products and marketing into BenefitsPro Agencies*

**Coaching • Training • Marketing • Lead Generation • Exclusive Territories**  
**Synched Together With**

**An Edge-To-Edge Benefits Dashboard ▪ An All-In-One MobileVue Benefits App**

[MyEBenefitsHub.com](http://MyEBenefitsHub.com)

National Headquarters — Orlando, Florida ♦ [Grow@MyEBenefitsHub.com](mailto:Grow@MyEBenefitsHub.com) ♦ 407.878.3520



## *IT TAKES A VILLAGE*

**An Open-Architecture Distribution Structure – Continuous Cross Pollination**

**22 B/Ds • 53 Agencies • 130+ Accounting Firms • 3,500+ Agents/Brokers/Advisors**



**Presently Serving: 86,000+ Businesses with 4,400,000+ Employees**



**OPENSHELF “EXCLUSIVE PROVIDERS”**  
**CorePartners ▪ KeyPartners ▪ SilverPartners**

**+**

**THE EBHUB TRIPOD OF COREPARTNER PLATFORMS**

**Payroll & HR  
Platform**

**Health Care  
Platform**

**Tax-Qualified Plan  
Platform**

**All Fused Within The  
EBHUB DASHBOARD & APP**



### **BenefitsPros Engage Clients In A New Way**

Bridge Tech Gaps With Ease ▪ Expand Client Offerings  
Harvest More Clients ▪ Future-Proof Success ▪ Neutralize Competitors

Spring 2024 Symposium  
March 20 thru 22



7 Podcasts Scheduled  
11/1/2023 Thru 1/1/2024

## COREPARTNER SHOWCASING – EMBED WITH EBHub BenefitsPros

### *It Takes a Village • One Harmonized Team*

EBHub and Exclusive Category CorePartners collaborate to better serve BenefitsPros

- Cross Marketing of Top-Tier Services and Products within the HUB ▪

### *CorePartners fuse into the EBHub Dashboard and All-In-One MobileVue App*

### The Showcasing Bundled Portfolio – All-Inclusive

365/24/7 “Blocking & Tackling” Coupled with Spring and Fall “Halftime Shows” - Symposiums

- Present (45 min.)/Exhibit at our Spring & Fall EBHub Symposiums - Interview Sessions, etc.
- Placement on the EBenefitsHub Website, Dashboard and Open Chassis MobileVue App
- Link to all “Partner” products and services within the EBHub Dashboard & Mobile App
- Participation in our EBenefitsHub Chapter Roundtable Meetings - Major cities nationally
- Placement on the EBenefitsHub BenefitsPros Core Partner Online Directory
- Two EBH staffers dedicated to connecting CorePartners with BenefitsPro Agents and Agencies
- Clickable logo placement on “side bar” of all internet based:
  - Monthly Newsletters • Announcements • Press Releases, etc.
- Exposure to: Business Associations • Franchises • University Family Enterprise Centers
- Provide Knowledge Center content at the EBenefitsHub Site: Articles, Whitepapers, Videos, etc.
- Presenting in a minimum of Two Podcasts Annually
- Link within the EBHub Dashboard and Mobile App
- Placement on EBHub white-labeled marketing materials:
  - Mobile Apps, Brochures, Booklets, PowerPoint Presentations, etc.



**KEYMEDIA  
PARTNERS**



**Pershing**  
A BNY MELLON COMPANY

**BDO**  
ALLIANCE USA

**benefitsPRO**

**SRM**  
BETTER WORKPLACES  
BETTER WORLD

**ebn**

**Family  
Business**

**ONABIP**  
Empowering the Future of Wealth

# The EBenefitsHub Dashboard

Empowering BenefitsPros On Their Terms

**A Seamlessly Harmonized Dashboard and MobileVue Benefits App**

Design • Quote • Present • Enroll • Engage • Communicate • Enhance • Renew • Manage

## All In One Place

Our High Touch Coaching, Training and Marketing Suite

Coupled With CorePartner Digital Solutions

• Your Open-Option Central Nervous System •



### Core Partners



### Core Partners



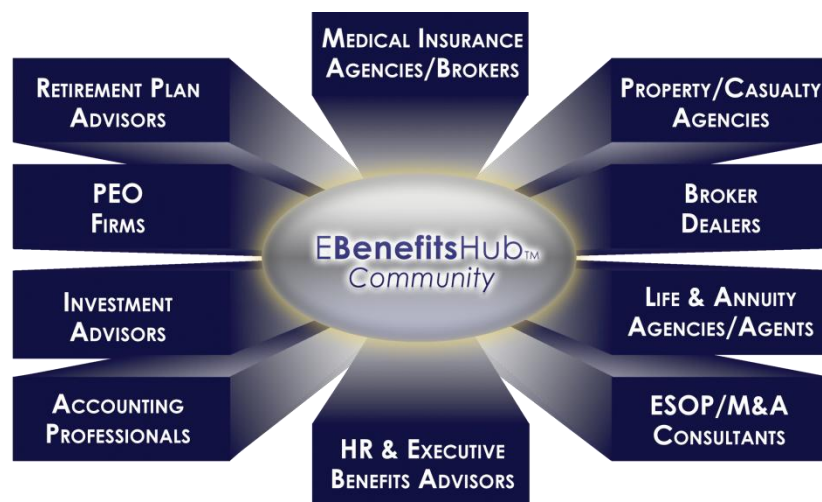


**The EBenefitsHub Community**  
**Mastermind Groups Within Regions Nationally**  
*Exclusive Territories Available*

**Platform PowerTool Resources**  
*Fused With Snap-On Solution Options*

**Dedicated Growth Manager**  
Coaching Hotline  
Training, Marketing and Sales Tools

**Knowledge Center**  
National and Regional Conferences  
Master Classes • Blogs • Articles  
Announcements • Podcasts  
Newsletters • webinars



**Platform PowerTool Resources**  
*Fused With Snap-On Solution Options*

**Regional Mastermind Groups**  
*Collaborate With*  
**The Family BusinessHub**  
Business Associations • Franchises  
Local Family Enterprise Centers

Private Labeled Marketing Materials  
Prospecting Databases  
Exclusive Territories Available

**In a Sea of Sameness - Brand • Position • Differentiate - Create an Unfair Advantage**

**“BenefitsPros can Future-Proof themselves from the tsunami of competitors . . . today and tomorrow”**







## **BenefitsPro Membership Packages - FusionPower**

***Fusing new tech, services, products and marketing into your Agency – On your terms***

Coaching • Training • Marketing • Lead Generation • Exclusive Territories • White Labeling • More

### **Passport Membership**

**\$79 Monthly per BenefitsPro**

**Access Our GrowthPortal and Dedicated Growth Manager**

- OpenShelf Products & Services Providers Menu
- Access our BenefitsPro Knowledge Center: Blogs, Articles, Videos, Whitepapers, Announcements and Webcasts
- Placement on our EBHub National Directory
- Access Coaching, Training, Marketing & Sales Tooling
- Collaborate with EBHub Partners: Business Associations, Franchises and University Family Enterprise Centers
- Discounts for National EBHub National Conferences



### **Stand Alone Membership Packages**

*Can Be Synchronized With*

- **Edge-To-Edge Benefits Dashboard Engine** ▪
- **White Label, All-In-One MobileVue Benefits App** ▪
- **CorePartner Products and Services Consortium**▪

*Design • Quote • Present • Enroll • Engage  
Communicate • Enhance • Renew ▪ Manage*

### **Passport+ Membership**

**\$129 Monthly per BenefitsPro**

**Access Our GrowthPortal and Dedicated Growth Manager**

- OpenShelf Products & Services Providers Menu
- Access our BenefitsPro Knowledge Center: Blogs, Articles, Videos, Whitepapers, Announcements and Webcasts
- Placement on our EBHub National Directory
- Access Coaching, Training, Marketing & Sales Tooling
- Collaborate with EBHub Partners: Business Associations, Franchises and University Family Enterprise Centers
- Discounts for National EBHub National Conferences

**▪ PLUS ▪**

**Access Our Marketing and Leads Deployment**

- Exclusive Territories By Zip Code
- White Labeled EBHub Marketing Materials: Brochures, Booklets, PowerPoint Presentations, etc.
- Fuse into our Regional Family Business Mastermind Groups
- Utilize the EBHub National Small Business Database: 4.6 Million+ with 27 Data Points
- Utilize the EBH Business Owner Trade Association Database: 23,000+ with 16 Data Points



**Our OpenShelf Products and Services Team**  
**The National CorePartner "Tripod" For BenefitsPros**

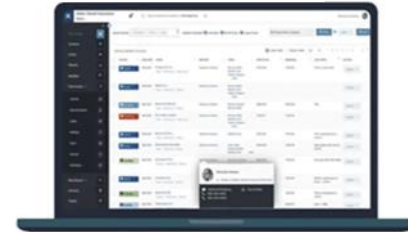
**PAYROLL - HR PLATFORM**



**Self Insured • HEALTH CARE • Fully Insured**



**TAX-QUALIFIED PLANNING**



**EXCLUSIVE NATIONAL COREPARTNERS – OPENShelf SOLUTIONS**

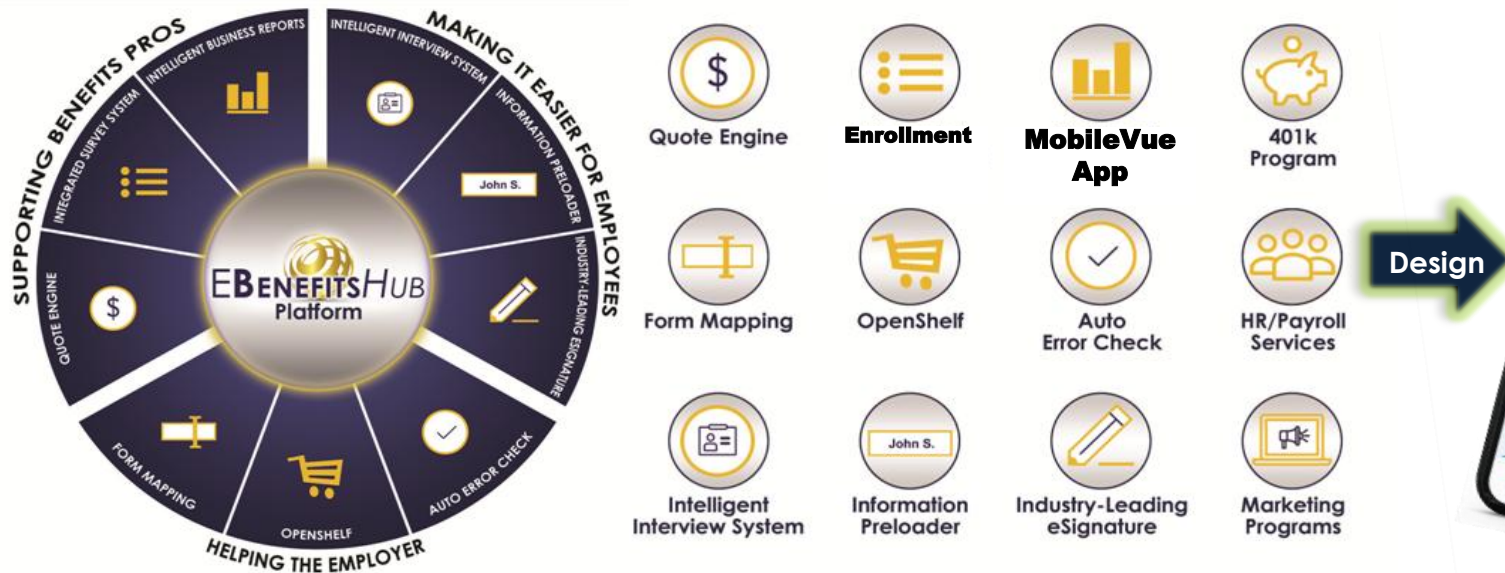




## The EHub Edge-To-Edge Dashboard Engine – *Your Unfair Advantage*

**Coordinates With Our Customizable, All-In-One MobileVue Benefits App**

Design • Quote • Present • Enroll • Engage • Communicate • Enhance • Renew • Manage



***Power-Synching BenefitsPros with Employers, Employees and Providers***





## Dashboard Core Features - Your Agency Cpommand Centr

An Edge-To-Edge Ecosystem ► Providing "Choices Of Options" on a Plug-In-Play Platform

▪ **BenefitsPros** can fuse new ingredients into their products and services "mixing bowl" with ease ▪



**FusionPower ► Dynamic Functionality ▪ Modern Digital Engagement**

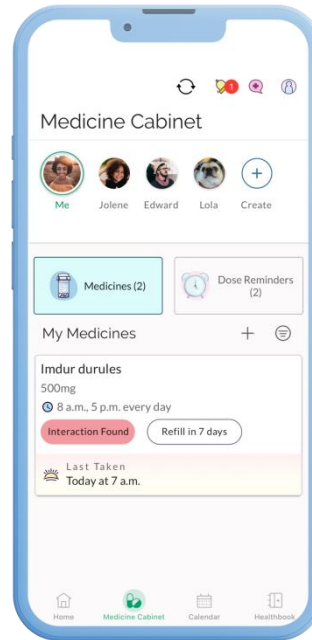
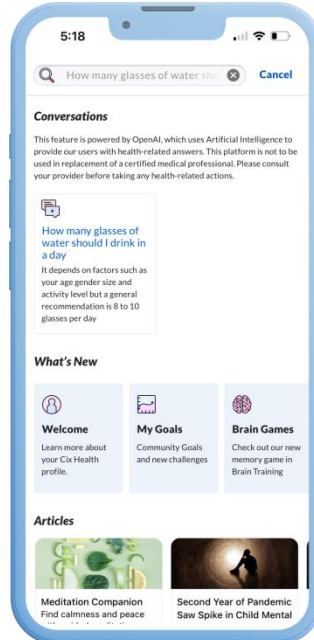
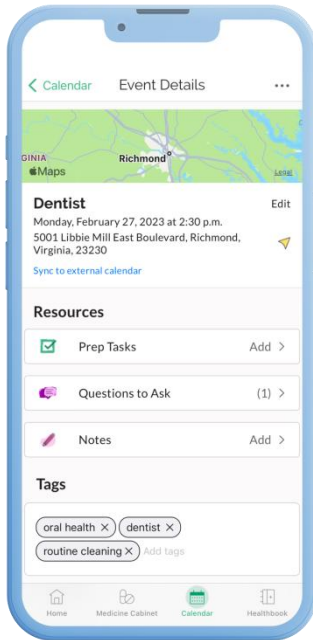


## The EBHub MobileVue Benefits App

All-In-One ▪ Provider Agnostic ▪ Open-Chassis Design ▪ White Label ▪ Built-In Wellness Engine

### Customized availability for BenefitsPros Partners and Clients

Agencies ▪ Employers ▪ TPAs ▪ Providers ▪ Carriers ▪ MGAs ▪ HR/Payroll Firms ▪ Business Associations



**All-In-One Design**  
**Employee**  
**Engagement Engine**

**Benefits Enrollment**  
**and Management**

**Payroll/HR**  
**Training Center**

**Design**

**Employee**  
**On-Boarding**

**News - Events**  
**Calendars**  
**Announcements**

**Task Manager**  
**Instant Messaging**  
**Push Notifications**

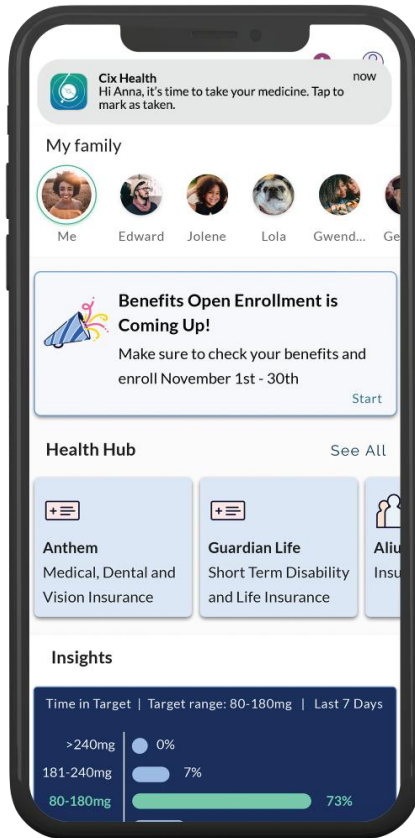


**Touching employers and employees “where they are”**



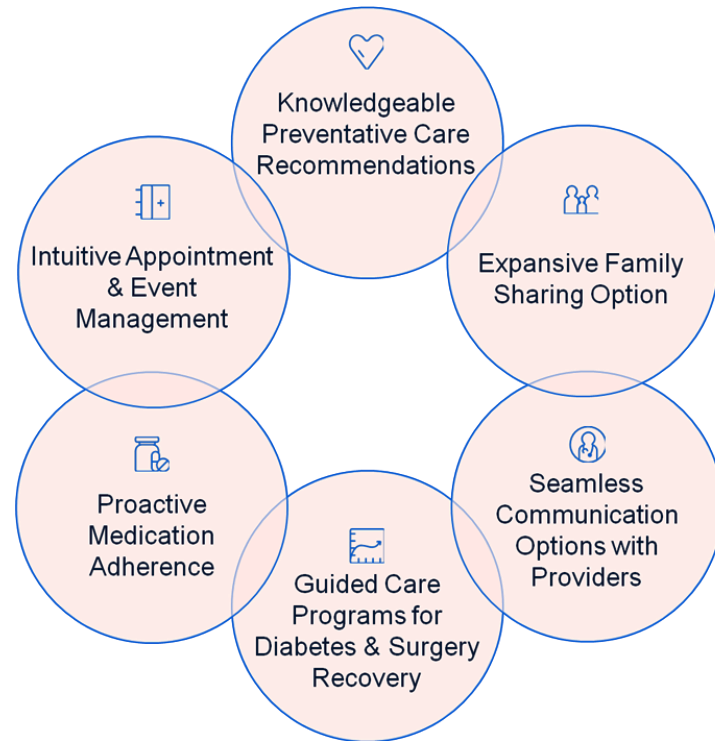
## Your MobileVue Benefits App Employee Engagement Engine

*Built-In Employee-family health and financial wellness thru the workplace*



**Intuitive reminders to keep employees engaged**

**Customizable Health Hub and Employer announcements!**



***Seamlessly harmonized benefits in the palm of your hand***



## Your MobileVue App harnessed within a Design/Admin Console

Simplified digital structure for ease of use ▪ Customized Integrations ▪ Built-In Wellness Engine

### MobileVue App Console Design ▶ Streamlined connections ▪ Instant team sharing

#### EBENEFITS HUB

EMPLOYER

EMPLOYEE

#### HEALTH HUB

#### ANNOUNCEMENTS

##### Current Announcements

**Open Enrollment Coming Up!**  
Make sure to check your benefits and enroll November 1st - 30th

**Participate in Fitness Lunch Wednesdays!**  
Take a 90-minute lunch break to walk and get your body moving.

##### Scheduled Announcements

**Select your Primary Care Provider**  
Add a PCP for you and your family to stay on top of your health.

#### EVENTS

##### Current Events

##### Upcoming Events



### Provider Agnostic - Sample Providers



**SwiftMD**  
24/7 Telehealth  
Services



**MyHealthily**  
Benefits Dashboard



**NueSynergy**  
Benefit Solutions



### Open Enrollment Coming Up!

Make sure to check your benefits and enroll November 1st - 30th

[View](#)

Wed  
**16**  
Nov

### Health Screenings Fair

Check preventative screenings of...

11:00 a.m. - 1:00 p.m.  
Company Commons

Scheduled: 10/09/23 | 10:00 a.m

[Delete](#)



## EBHub Spring National Conference Invitation

Sample LinkedIn Post - Podcasts

**THE EBenefitsHUB PODCAST SERIES**

**HOST**  
Nick Gregory  
CEO  
EBenefitsHub

**Special Guest**  
John Lawlor  
CEO  
SwiftMD

**EBenefitsHUB**  
Empowering Benefits Pros On Their Terms

*Introducing The Modern Version Of Telemedicine Services*

**Special Guest**  
John Lawlor - CEO of SwiftMD

**SWIFTMD**  
Talk to a Doctor. Anytime. Anywhere.  
A REVIVERHEALTH COMPANY

**THE EBenefitsHUB PODCAST SERIES**

**HOST**  
Nick Gregory  
CEO  
EBenefitsHub

**Special Guest**  
Brian Ronnau  
CEO & Co-Founder  
CIX Health

**EBenefitsHUB**  
Empowering Benefits Pros On Their Terms

*Customizing An All In One Mobile App For The Employee Benefits Industry*

**Special Guest**  
Brian Ronnau - CEO & Founder of CIX Health

**cix health**





## EBHub Spring National Conference Invitation

Sample LinkedIn Post Format

The BenefitsPros Empowerment Symposium

Learn How To Build Your Seamlessly Harmonized Benefits Platform - Your Way  
Design • Quote • Present • Enroll • Engage • Report • Renew • Manage

Nelson Griswold, Janet Trautwein And Other Nationally Renowned Presenters  
Providing Snap-On Success Solutions

Neutralize Competitors  
Expand Client Offerings

Create An Unfair Advantage  
Harvest More Clients

Magnify Your Success  
Become More Agile

Bridge Digital And Manual Processing Gaps

April 27th Thru 29th - Safety Harbor Resort - Tampa Bay

The graphic features a dark blue background with a subtle pattern of white lines. It includes portraits of two women on the left and a man on the right. At the bottom, there is a photograph of the Safety Harbor Resort in Tampa Bay.

Our Fall EBenefitsHub Symposium  
VIDEO QUIK-TAKE INTERVIEW SERIES - KEY PRESENTERS

EBenefitsHub

John Kirchmeyer  
Director of Sales & Marketing  
NueSynergy

NueSynergy

EBenefitsHub  
Empowering BenefitsPros On Their Terms

Fusing New Tech, Services, Products And Marketing Into Your Agency

The graphic has a dark blue background with a subtle pattern of white lines. It features a video thumbnail showing two men sitting on a stage. The NueSynergy logo is prominently displayed.

Orlando  
September  
27th - 29th

EBenefitsHub

The EBenefitsHub  
Empowerment  
Symposium

Become A FusionPowered BenefitsPro

Build Your Seamlessly Harmonized  
Benefits Platform - On Your Terms

Selected Presenter  
Josh Collins  
President  
NueSynergy

The graphic has a dark red background with a subtle pattern of white lines. It features a portrait of Josh Collins, President of NueSynergy, on the right.



## CorePartner - Initial Press Release Sample

### **EBenefitsHub Announces NueSynergy as Exclusive National Core Partner**

ORLANDO, Florida – EBenefitsHub is pleased to announce its addition of NueSynergy as an Exclusive National Core Partner. “We are excited to include the fully integrated suite of administration services assembled by Josh Collins, President, and the rest of the NueSynergy team over the past 27 years,” said EBenefitsHub Founder and CEO, Nick Gregory, ChWE. “NueSynergy has earned respect for its industry-leading service, innovative technology, and excellence in providing full-service administration of consumer-driven and traditional account-based plans among other solutions.”:

***Flexible Spending Accounts, Health Reimbursement Arrangements, Health Savings Accounts, Lifestyle Spending Accounts, SpouseSaver Incentive Accounts, COBRACare+ Administration, Premium Only Plans, Combined Billing, Direct Billing, and Private Label Solutions.***

“NueSynergy continues to expand its national presence by offering a wide variety of forward-thinking, employer-centric products and services,” said Josh Collins, president of NueSynergy. “It’s important for us to work alongside an elite and diverse group of reputable companies to build solutions and long-term relationships for our mutual clients.”

**With this announcement, NueSynergy joins a collection of exclusive, best-of-breed CorePartner organizations to provide services and products to BenefitsPros across the country. The result is the fusion of advanced knowledge, experience, services, technology, and products to create a synchronized hub for BenefitsPros and their business clients.**

“We have engineered a modernized suite of snap-on digital solutions coupled with an arsenal of resources necessary for employee benefits providers to prevail within today's competitively complex employee benefits landscape” said Nick Gregory, CEO and Founder of EBenefitsHub. “BenefitsPros can design and build their digital benefits hub . . . as they wish.” “With the help of NueSynergy and our other CorePartners, BenefitsPros can embrace the digital revolution, bridging the gaps while cutting away the bad plumbing of detached digital and manual processes . . . their way. They can neutralize competitors, expand client offerings, harvest more clients, and future-proof success. In a sea of sameness, BenefitsPros can brand, position and differentiate to create an unfair advantage.” said Gregory.

#### **About NueSynergy**

NueSynergy, Inc., a privately held company, is one of the nation’s fastest growing employee benefits and billing administrators in the country. Headquartered in Leawood, Kansas, NueSynergy also has locations in Arizona, Florida, Idaho, North Carolina, Virginia, Washington, and Rzeszów, Poland. NueSynergy offers a fully integrated suite of administration services, which include Health Savings Account (HSA), Health Reimbursement Arrangement (HRA), Flexible Spending Account (FSA), Lifestyle Savings Account (LSA), and COBRACare+ administration as well as SpouseSaver Incentive Account, Combined Billing, Direct Billing, and Specialty Solutions. For more information, visit [www.NueSynergy.com](http://www.NueSynergy.com).



## **THE WHY – OUR PASSION & PURPOSE**

### **Powering BenefitsPros On Their Terms**

Powered by 41+ years of experience and success of The Wealth Engineering Family of Companies in conjunction with the launch of its sister company, The Family Business Hub, The EBenefits Hub was born. Assembling a taskforce of best-of-breed partners, the EBenefits Hub mission was to amplify the success of BenefitsPros on their terms.

**To do so, the taskforce engineered a modernized suite of coaching, training and marketing services coupled with snap-on digital solutions and an arsenal of other resources from carefully selected CorePartners demanded by BenefitsPros to prevail within today's competitively complex employee benefits landscape.**



## **The Result**

A seamlessly harmonized benefits, engagement and communications ecosystem engineered into a holistic Dashboard and branded Mobile App for BenefitsPros and their Clients.

*Design • Quote • Present • Enroll • Engage • Communicate • Enhance • Renew • Manage*

**BenefitsPros can embrace the digital revolution; bridging the gaps while cutting away the bad plumbing of detached digital and manual processes . . . *their way.***





# EBHub BenefitsPro Marketing Platform

Sample Brochure Cover Page



## Collaborating With

Trade & Professional Business Associations  
Businesses • Franchises • Chambers of Commerce  
Family Enterprise Centers Across The Nation

## The Platform

Online Directory • Private Labeled Marketing Materials  
Benefit Provider OpenShelf Access • Continuous Marketing Campaign  
Announcements • Press Releases • Ads

## Knowledge Center

Teleconferences • Conferences • Newsletters • Webinars • Articles

## **THE EBENEFITSHUB**

National Headquarters — Orlando, Florida

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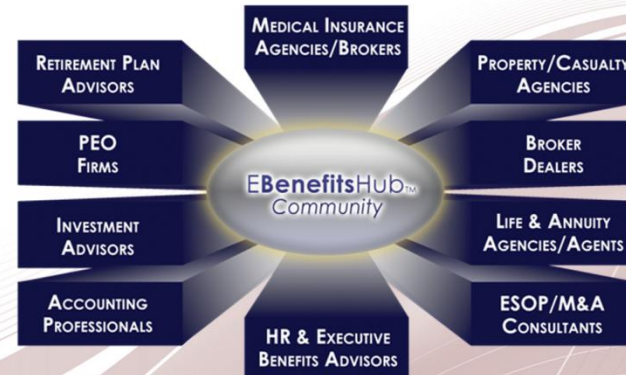
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Brand, Position, and Differentiate



Advisor Brochure





**Empowering BenefitsPros On Their Terms**

**In a Sea of Sameness - Brand ▪ Position ▪ Differentiate - Create an Unfair Advantage**  
*Neutralize Competitors ▪ Expand Client Offerings ▪ Harvest More Clients ▪ Future-Proof Success*



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“Embrace the digital revolution; bridging the gaps while cutting away the bad plumbing of detached digital and manual processes . . . your way.”

**POWERED BY**

