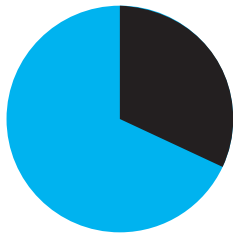


Benefits and Pension Services

Enhance wellbeing, engagement and financial security for plan participants



30% SaaS
70% outsource



10% of revenue reinvested
in technology annually



assisting groups
between 3K-290K



1,000,000+
interactions annually



We are the benefits, retirement and technology specialists driving change in benefits administration. For over 55 years, LifeWorks has provided innovative solutions that empower our clients and their plan participants, and simplify the administration of benefits programs. We provide organizations with benefits administration, retirement solutions and billing management, using our highly flexible technology platform that streamlines complicated processes and improves service.

Our flexible approach to benefits and pension administration is driven by a deep understanding of the needs of our clients. Our people provide the guidance and options needed to resolve our clients' challenges and help them achieve their objectives.

Powering benefits and pension services for progressive organizations.

Our benefits and pension services are powered by our proprietary technology platform. Our platform is the strategic engine that provides full back-office, rules-based functionality to maximize administrative productivity. And with outsourcing, co-sourcing and software as a service (SaaS) models, we can meet the unique needs of our clients.

22K
lives

average client size

Why LifeWorks?

Our technology integrates seamlessly with your existing tech and infrastructure, providing you with greater flexibility and eliminating process overlaps and duplication.

LifeWorks can consolidate your data, offering full end-to-end workflows and robust reporting capabilities that provide a better understanding of your employees' usage behaviors and how they can impact your overall strategy. Our client-branded websites allow member self-service for plan specific information, enrollment, initiation of transactions, viewing of statements, and printing of forms. These custom sites provide plan members with easy access to answers for the most commonly asked questions. Members can also use our online resources from their tablet or smartphone.

Our staff is talented and diverse in experience and skillset, enabling us to match the right team to work with each client. We will work with your organization to plan, research and deliver an integrated package of services that meet your unique requirements.



300+ clients served

4M+

lives serviced

Health and Welfare Services



- Client-branded self-service portals
- Eligibility maintenance and data management
- Online annual and periodic enrollment
- Decision support tools
- Automated feeds to all carriers
- Closed loop payroll
- Automated workflow engine
- Participant communication and fulfillment
- Premium reconciliation, billing and payment
- Life event processing
- Dependent verification
- ACA tracking and reporting
- Call center services
- Advocacy services
- Employer/employee direct billing
- Real-time reporting (standard and ad-hoc)
- COBRA administration

Pension Services



- Support qualified and non-qualified defined benefit plans
- Manage current and historical plan provisions
- Interface with HRIS system, pension payroll provider and actuary
- Retiree self-service including decision support tools, guidance and education
- Online pension estimates with instant access to results
- Full online retirement capability
- Online beneficiary elections and management
- Call center services
- Specialized service for executives as well as retirement and death events
- Automated participant communications and notifications
- Administration of QDROs, RMDs, death audits and lost participant searches
- Plan sponsor portal with access to participant data, case management, reports and ad-hoc reporting

Let us help.

LifeWorks is a global leader in delivering technology-enabled solutions that help clients support the total wellbeing of their people and build organizational resiliency. By improving lives, we improve business. Our solutions span employee and family assistance, health and wellness, recognition, pension and benefits administration, retirement and financial consulting, actuarial and investment services.