



THE NEW  
BENEFITS  
MINDSET



# A Business-Minded Approach to Benefits

## BeneFiscal APPROACH<sup>SM</sup>

The **BeneFiscal Approach<sup>SM</sup>** is our proprietary approach to benefits. It revolves around your Business Goals and is supported by a continuous track of *Business Advocacy* (the financial interests of your organization) and *Employee Advocacy* (the interests of your employees). Our *Dedicated Account Teams* achieve this balance across Six Service Areas.



## Flawless New Client Implementation – 3D Process

### STEP ONE



#### Diagnose

- > Collect data
- > Perform consultative review

### STEP TWO



#### Design

- > Develop initial plan
- > Define immediate action steps
- > Determine milestones and deliverables

### STEP THREE



#### Deliver

- > Implement strategy
- > Evaluate performance
- > Deliver results

## About Us

**FOUNDED**  
1959

**STATUS**  
Private company

**TEAM**  
Nearly 400 insurance, benefits and risk management experts

**REACH**  
National organization with clients in all 50 states and abroad

**OFFICES**  
New York  
New Jersey  
Pennsylvania  
Delaware  
Massachusetts  
Florida

**AFFILIATES**  
AIM Benefits,  
Conner Strong  
Captive Strategies,  
PERMA Risk  
Management Services,  
J.A. Montgomery  
Risk Control

## Dedicated Strategic Consulting Team

Executive Vice President  
Employee Benefits Division

Practice Leader

Consultant

Relationship Manager

Associate  
Consultant

Data Analytics  
Associate

Communications  
Associate

Health &  
Wellness  
Associate

Pharmacy  
Associate

BeneService  
Team

Compliance  
& Audit

Employee  
Benefit  
Specialist

**CONNER  
STRONG &  
BUCKLEW**



INSURANCE | RISK MANAGEMENT | EMPLOYEE BENEFITS

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