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# Holistic Employee Benefits Checklist

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*Benefits with a check mark are offered at no cost to the employer.*

## Core Employee Benefits

- ☐ **Medical Insurance Options**
  - Flexible, affordable health plans for employees.
- ☐ **Pet Insurance** (Minimum Employer size 20)
  - Coverage up to \$25,000, appealing to pet-owning employees.
- ☒ **Estate Planning Services**
  - Free family revocable trusts to help employees avoid costly probate.



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## Supplemental Benefits

- ☐ **Accident Expense Insurance** (\*Avg Cost \$10)
  - Helps cover unexpected expenses from accidental injuries.
- ☐ **Hospital Indemnity Insurance w/Critical Illness Rider 10K** (\*Avg Cost \$17)
  - Provides cash benefits for hospital stays to support out-of-pocket costs.
- ☐ **Guaranteed Issue Employer Sponsored Life Insurance** (Avg Cost \$6)
  - No medical exams required; peace of mind for employees and their families.
- ☐ **Short-Term Disability Insurance** (\*Avg Cost \$18)
  - Provides income replacement for employees who are temporarily unable to work due to illness or injury.
- ☐ **Critical Illness Insurance** (\*Avg Cost \$20k \$10, \$30K \$15)
  - Covers major illnesses like cancer, heart attack, and stroke, helping employees manage the financial impact.
- ☐ **Dental Insurance** (\*Avg Cost \$15)
  - Comprehensive coverage for dental care, including preventative, restorative, and emergency services.
- ☐ **Vision Insurance** (\*Avg Cost \$5)
  - Coverage for eye exams, glasses, and contact lenses to support employees' eye health.
- ☐ **Telemedicine Services** (\*Avg Cost \$6)
  - Access to virtual healthcare consultations, offering convenience and savings on medical care.

## Financial Well-Being Services

- ☐ **Tax-Deductible Health Benefits under IRS Code 213(b)**
  - For select employees, covering out-of-pocket medical costs and enhancing financial security.

## Employee Educational on Benefit Usage

- ☒ **Monthly Educational Updates**
  - Written and podcast formats to teach employees how to effectively use their benefits and improve their financial wellness.

## Customized Enrollment and Administration

- ☒ **Custom Online Enrollment Pages**
  - Simplifies sign-ups and management with personalized pages for your business, plus easy online scheduling for employees to book appointments with an agent for any questions.

Schedule today: [HolisticEB.com/appt](https://HolisticEB.com/appt)

*\*The average costs listed are based on biweekly payroll for a 44-year-old employee earning \$55,000 per year.*

*California Insurance Disclosure*

*The benefits listed on this page are not insurance offers but are intended to gauge interest in employee coverage options. The information provided is subject to California state regulations, and coverage details, eligibility, and premiums may vary. Please review the plan documents for complete details. For questions or further clarification, contact a licensed insurance professional.*