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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: [Holisticcb.com/appt](https://Holisticcb.com/appt)

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