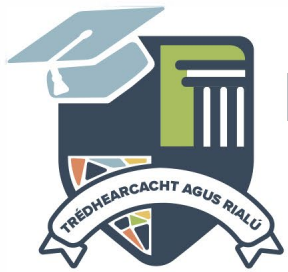


A MASTERCLASS FOR ADVISORS

February 29, 2024 | 3:00pm - 3:45pm EST

What to Expect the First Year in the Roundstone Captive



ROUNDSTONE
UNIVERSITY



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Regional Practice Leader,
Roundstone



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Manager of Customer
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Overview: Before the Effective Date

1

Binding via
DocuSign

2

Onboarding &
Implementation

3

Signed SPD

4

Policy of
Insurance

You got an agreement, now what?

Let's confirm a few things first:

- Are there any additional changes?
- Which proposal are we binding?
- Who from the agency should receive our electronic binding packet?
- Who at the employer should receive it?



Binding

In the first 3 days:

- Roundstone sends the electronic binding packet.
- Strategic Relationship Manager will contact the advisor to set up a walk-through of the electronic binding packet.

The Binding Packet

1. Your Roundstone Proposal
2. Plan Sponsor Disclosure
3. The Application for Stop Loss Coverage
4. Participation Agreement
5. Binding Invoice
6. ACH Information Sheet
7. Notice Regarding Stop Loss Premiums

TPA Onboarding Overview

During Onboarding:

- TPA will initiate the onboarding process (30-45 days before go-live date)
- Implementation calls to:
 - Gather Group Information & Review Benefits
 - Discuss Accounting and Funding; Set Expectations
- Plan Documents (SBCs, SPDs) & Supporting member materials
- Setup of Additional Vendors (Telemedicine, EAP, COBRA)
- Census intake & ID Card Delivery
- Administrator Portal, Member Portal, Mobile App Access

After Onboarding is Complete:

- Transition to your day-to-day service team
- Claim Processing will begin 45 days post go-live
- Once SPD and all other requested binding items are received, Roundstone can issue a policy of insurance and begin paying stop-loss claims

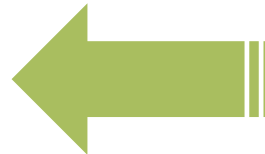
Overview: After the Effective Date



What to Expect After Effective Date

First

Our Approach:
Customer-First Mindset



Second

Captive Performance
Statements: 45 Days
after each Quarter

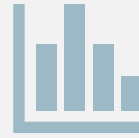
Third

Reporting: Cost
Savings Investigators
(CSI) Dashboard

Fourth

Ongoing: Throughout
months 4-12, the CSI Team
will review claims activity

The Renewal Process



Claims Reporting from
your TPA



After 7 to 8 months:
Renewal Strategy Meeting



Over 90% of Clients Renew



2024 MEDICAL CAPTIVE FORUM | MAY 1ST & 2ND | NEW ORLEANS, LA

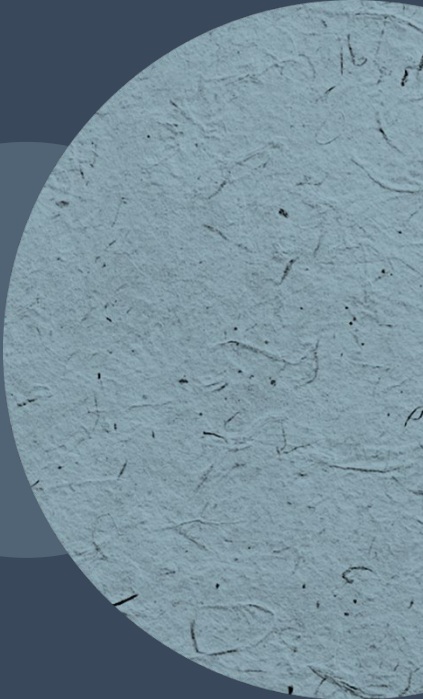
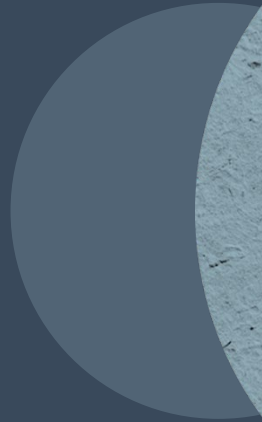
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Q&A





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