



Benefits and Pension Services

Enhance well-being, engagement and financial security for plan participants

WE ARE THE BENEFITS, retirement and technology specialists driving change in benefits administration. For over 50 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.

30+
industries served



30%
SAAS

70%
OUTSOURCE



10%
revenue re-invested in
technology annually

4M+
lives serviced

300+
clients served

assisting groups between

3K-
290K



1M+
interactions annually

average client size of

22K
LIVES



Global
offices



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.

Health & Welfare Services

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



Pension Services

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



To learn more, visit [LifeWorks.com](https://www.lifeworks.com)