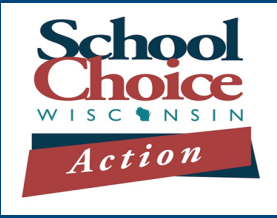


School Choice 2019-2020 Quality Webinar Series Presents

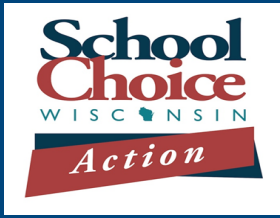
School Choice Consortium Introduction – Strength in Numbers

Agenda



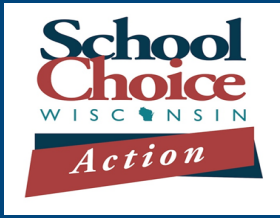
- Partner Introductions
- Benefits of the School Choice Consortium
- Criteria for Participation
- Program Fundamentals
- How Can Schools Participate
- Questions

Meet the Partners



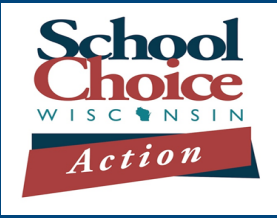
- Acting as General Agent, Infinity is a full service Wisconsin based benefits broker servicing schools and non profit organizations through a menu of services that include: medical and ancillary insurance, retirement plans and individual financial wellness

Meet the Partners



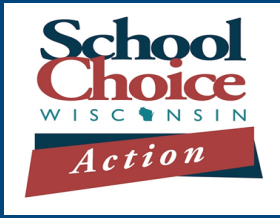
- With more than 20 years serving nearly 1 million employees from aggregated employer groups, UnitedHealthcare is uniquely positioned to deliver group health plans that help offer benefits to the employees of School Choice Wisconsin Action members

Meet the Partners



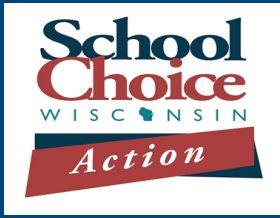
- Nationwide is one of the largest insurance and financial services companies in the world, offering a variety of tools and solutions to educate participants and give them information they can use to drive retirement readiness. Our simple, yet comprehensive, retirement readiness solutions help participants know where they are and where they're going.

Benefits of Participation



- Increase your buying power and bargaining ability
- Get access to medical plan designs only offered to larger groups
- Reduce your administrative cost through economies of scale
- Proprietary use of a national retirement plan program's tools, resources and out of the gate discounting
- Streamlined program for retirement plan administration

Criteria for Participation



Medical, Dental and Vision Program

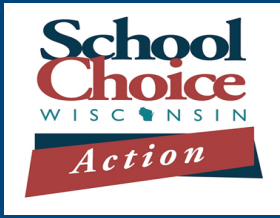
- School Choice Wisconsin member schools that are *faith based or have a religious affiliation*
- The School Choice Consortium's formation was possible using the federal Church Plan Parity act, which limits participation to religious based schools

Retirement Plan Program

- School Choice Wisconsin member schools can participate regardless of their religious affiliation



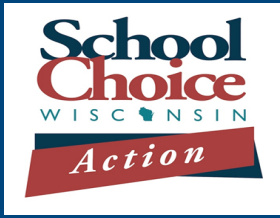
Program Fundamentals



Medical, Dental and Vision Program

- Provides for different rating factors than just age bands
- Provides for new plan designs that are not typically available in the small group marketplace
- Participating schools will enjoy the economies of scale that employers in the large group segment leverage today
- The more schools the larger the bargaining power which means the more potential for reduced rates
- Additional bundling discounts for Dental and Vision

Program Fundamentals



Retirement Program

- Each school is individually priced, with guaranteed discounts from stand alone underwriting
- Built in administrative and investment fiduciary services
- Consistent plan design and investment implementation for easier administration, implementation, and governance
- Systematic re-pricing of existing plans in the program as overall participation improves

Next Steps



Review presentation
with your leadership



Engage with your
broker or IBSI for
retirement plan



Start quoting new
plan designs

Medical, Dental and Vision Program

- To begin quoting contact your current broker
- General questions about the Consortium:
 - Infinity Benefit Solutions Inc., Client Services
 - Phone – 414-615-1880
 - Email –
clientservices@infinitybenefitsolutions.biz

Retirement Plan Program

- Peter Benz –Director of Investment Management, Infinity Benefit Solutions, Inc.
- Phone - 414-615-1887
- Email – peter.benz@nm.com

Questions

