



# Weekdays with Bernie

BerniePortal Users Conference

Nashville, TN • 2019

## Program Guide

March 25-27, 2019 | Hilton Nashville Downtown

Wifi: [hhonors\\_meeting](#) or [attwifi](#)  
Coupon Code: HH19



**BERNIEPORTAL**



# WELCOME TO WEEKDAYS WITH BERNIE

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Welcome to Nashville! We are so glad you're joining us for BerniePortal's second users conference, Weekdays with Bernie 2019. Please find in this program a full schedule of conference events, including guest speakers, breakout sessions, sponsor information and more.

It is our privilege to bring together leading benefits professionals from around the country for the second year in a row. We have learned so much from our broker partners, as well as from the many healthcare and business experts you will hear from over the next three days. We hope you leave Weekdays with Bernie feeling like you were able to connect and share best practices with these thought leaders and your peers.

As you know, this is an exciting—and challenging—time to work in the benefits industry. As costs rise, value is harder to find, and the advent of new approaches such as direct contracting and reference-based pricing are quickly changing the status quo.

While the industry is facing growing pains, new dynamics are creating real opportunity for the smart, innovative brokers we work with every day. At Weekdays with Bernie, we hope to provide you and your team with the advice you need to capitalize on those opportunities, and make the coming years the best yet for your business.

This is also an exciting time for BerniePortal. We have worked hard over the last 12 months on several new and exciting product updates, and have a few exciting announcements you won't want to miss. I also look forward to hearing from you throughout the next few days to help us shape BerniePortal's future.

The relationships we have built through BerniePortal mean a lot to me. What I've learned from our partners has served to confirm just how local healthcare truly is in the U.S., and how valuable a local broker's advice can be for employers in our nation's ever-changing healthcare landscape.

Thank you for your partnership,



*Alex Tolbert*

Alex Tolbert  
BerniePortal Founder





# TABLE OF CONTENTS

Welcome Letter .....	01
Conference Schedule .....	03
Hotel Map .....	04
Detailed Schedule   Day 1: Monday, March 25 .....	04
Detailed Schedule   Day 2: Tuesday, March 26 .....	05
Detailed Schedule   Day 3: Wednesday, March 27 .....	06
Conference Hotel Accommodations & Parking .....	08
Directions to the Airport .....	08
Taxi Services .....	08
Weekdays with Bernie Quick Facts .....	09
Photo Scavenger Hunt Rules and Items .....	10
Speaker Bios .....	11
Nashville Restaurants & Attractions .....	13
Map of Downtown Nashville .....	14
Meet the Client Success Team .....	15
BerniePortal Features .....	16
Thank You to Our Sponsors .....	17
Allstate .....	19
Unum .....	20
Coloring Pages .....	21
Broker Partner Network .....	23



# CONFERENCE SCHEDULE

## DAY 1: Monday, March 25

7:30 am - 8:30 am	Conference Check-In <i>(For pre-conference registrants only)</i>	Prefunction Area
8:30 am - 5:30 pm	BerniePortal Training <i>(For pre-conference registrants only)</i>	Ryman 1 & 2
4:00 pm - 6:00 pm	Conference Check-In	Prefunction Area
6:00 pm - 8:00 pm	Welcome Reception <i>(In the case of poor weather, join us in the Front Atrium)</i>	Ryman Terrace

## DAY 2: Tuesday, March 26

7:30 am - 8:30 am	Conference Check-In / Breakfast	Front Atrium
8:30 am - 9:00 am	Opening Remarks: Alex Tolbert, BerniePortal	Boone / Crockett
9:00 am - 10:30 am	Keynote Speaker: Senator Bill Frist on <i>The Skyrocketing Cost of Healthcare</i>	Boone / Crockett
10:30 am - 11:00 am	Exhibitor Visits (Break)	Prefunction Area
11:00 am - Noon	Bernie Breakouts:	
	- <i>Benefits Industry M&amp;A</i>	Ryman 1
	- <i>Amazon in Healthcare</i>	Ryman 2
	- <i>Five-Star Tech Support</i>	Ryman 3
Noon - 1:00 pm	Lunch	Front Atrium
1:00 pm - 2:30 pm	General Session: Andy Bailey on <i>No Try Life</i>	Boone / Crockett
2:30 pm - 3:30 pm	Bernie Breakouts:	
	- <i>Eliminating Data Entry with Technology</i>	Ryman 1
	- <i>Building the Ladder</i>	Ryman 2
	- <i>Meta-Planning for BerniePortal</i>	Ryman 3
3:30 pm - 4:00 pm	Exhibitor Visits (Break)	Prefunction Area
4:00 pm - 5:30 pm	BerniePortal Keynote: Alex Tolbert on <i>What's New with BerniePortal?</i>	Boone / Crockett

## DAY 3: Wednesday, March 27

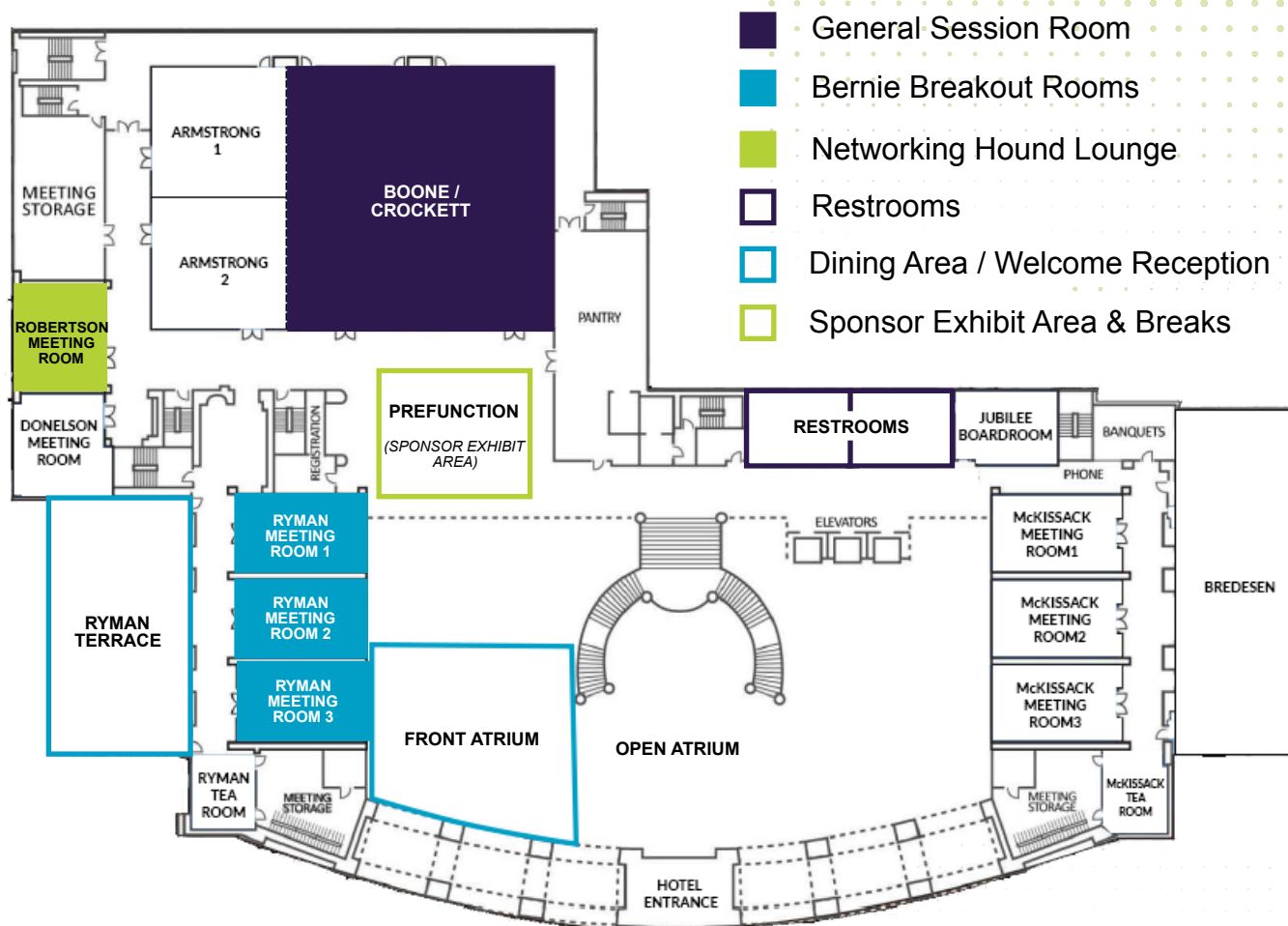
8:00 am - 9:00 am	Breakfast	Front Atrium
9:00 am - 10:30 am	General Session: John Boyens on <i>Growing Your Book of Business</i>	Boone / Crockett
10:30 am - 11:00 am	Exhibitor Visits (Break)	Prefunction Area
11:00 am - Noon	Bernie Breakouts:	
	- <i>A Crack In the Foundation</i>	Ryman 1
	- <i>Think Like a CFO</i>	Ryman 2
	- <i>Future of Benefits Advising</i>	Ryman 3
Noon - 1:00 pm	Lunch	Front Atrium
1:00 pm - 2:30 pm	General Session: Lester J. Morales on <i>Reference-Based Pricing 2.0</i>	Boone / Crockett
2:30 pm - 3:30 pm	Bernie Breakouts:	
	- <i>Prospecting for Gold</i>	Ryman 1
	- <i>Meta-Planning for BerniePortal</i>	Ryman 2



# HOTEL MAP & DETAILED SCHEDULE

Wifi: [hhonors\\_meeting](#) or [attwifi](#)

Coupon Code: HH19



## DAY 1 *Monday, March 25th*

7:30 am - 8:30 am

**Conference Check-In** – For pre-conference registrants only  
Location: [Prefunction Area](#)

8:30 am - 5:30 pm

**BerniePortal Training** – For pre-conference registrants only  
Location: [Ryman Meeting Rooms 1 & 2](#)

4:00 pm - 6:00 pm

**Conference Check-In** | Location: [Prefunction Area](#)

6:00 pm - 8:00 pm

**Welcome Reception**

Join us onsite in the [Hilton Ryman Terrace](#), if weather permits, for refreshments. In the case of poor weather, please join us in the [Front Atrium](#).



# DETAILED SCHEDULE

## DAY 2 *Tuesday, March 26th*

7:30 am - 8:30 am	Conference Check-In   Location: Prefunction Area
7:30 am - 8:30 am	Breakfast   Location: Front Atrium
8:30 am - 9:00 am	Welcome Remarks: Alex Tolbert   Location: Boone / Crockett
9:00 am - 10:30 am	<b>Keynote Speaker: Senator Bill Frist – The Skyrocketing Cost of Healthcare</b> Location: Boone / Crockett <i>If skyrocketing costs of healthcare are really the fundamental culprit, how do we control the costs? Can competition and free markets really control healthcare costs? Where has competition worked, where has it failed, and what we can do to make markets work?</i>
10:30 am - 11:00 am	Exhibitor Visits & Break   Location: Prefunction Area
11:00 am - Noon	<b>Bernie Breakouts:</b> <ul style="list-style-type: none"><li>• <b>Benefits Industry M&amp;A – Dan Campbell</b> Location: Ryman Meeting Room 1 <b>Explore trends shaping benefits industry consolidation.</b> The pace of healthcare industry M&amp;A continues to accelerate, and the benefits sector is no different. In this session, we'll cover business continuation and succession planning, M&amp;A, multiples, buyers, sellers and the emotionality around transactions.</li><li>• <b>Amazon in Healthcare – Mick Rodgers</b> Location: Ryman Meeting Room 2 <b>How Amazon will impact corporate benefits plans and brokers.</b> Amazon has been a powerful and disruptive force in many industries. Mick served as an advisor to PillPack, acquired by Amazon for \$1 billion, and has placed business on behalf of the Amazon, Berkshire Hathaway, JP Morgan joint venture. In this session he'll cover the market forces that led to the creation of the venture, the competitive advantages and approach its using to enter the healthcare space, and where the venture will enter healthcare beyond insurance.</li><li>• <b>Five-Star Tech Support – Lindsey Van Cleave</b> Location: Ryman Meeting Room 3 <b>Providing next-level customer service.</b> Brokerages are increasingly defined by the quality of their customer service. In this session, we'll cover building out BerniePortal with employees in mind, using BerniePortal's compliance tools, and identifying opportunities to streamline your client's HR processes.</li></ul>
Noon - 1:00 pm	Lunch   Location: Front Atrium
1:00 pm - 2:30 pm	<b>General Session: Andy Bailey – No Try Life</b> Location: Boone / Crockett <i>Andy Bailey will crush the myth of time management and focus on goal setting, efficiency and priority management. After providing goal discovery and execution techniques, as well as tangible focus and concentration techniques, Andy will delve into four priority management techniques.</i>



2:30 pm - 3:30 pm

#### Bernie Breakouts:

- **Eliminating Data Entry with Technology – Jason Silverman**  
**Location:** Ryman Meeting Room 1  
*How to maximize efficiency as a tech-savvy agency. This session will focus on using the power of integrations to reduce redundant data entry and streamline agency management by adopting connected tech tools.*
- **Building the Ladder – Brian Tolbert**  
**Location:** Ryman Meeting Room 2  
*Using technology to support team member success and revenue growth. Is the structure of your agency contributing to company growth and client success? The way that many insurance agencies divide responsibility doesn't necessarily result in ideal account management or optimal career growth for employees. In this session we'll think about how to divide responsibility and tie compensation to strategically managing technology.*
- **Meta-Planning for BerniePortal – Alex Tolbert**  
**Location:** Ryman Meeting Room 3  
*What's next in BerniePortal's product roadmap? BerniePortal founder Alex Tolbert will lead two meta-planning sessions (see day 3, March 27 from 2:30pm - 3:30pm for the second meta-planning session) focused on choosing what's next in the product roadmap for BerniePortal. The audience will participate in brainstorming areas for improvement or new features BerniePortal should add. You'll have shared direct input into BerniePortal's product roadmap, and also learn how to conduct a meta-planning session for your firm.*

3:30 pm - 4:00 pm

Exhibitor Visits & Break | **Location:** Prefunction Area

4:00 pm - 5:30 pm

#### BerniePortal Keynote: Alex Tolbert – What's New With BerniePortal?

**Location:** Boone / Crockett

*BerniePortal founder Alex Tolbert will share the platform and company's latest updates, including a new product launch, improvements based on user feedback, and a new tool for broker partners to generate leads.*

## DAY 3 *Wednesday, March 27th*

8:00 am - 9:00 am

Breakfast | **Location:** Front Atrium

9:00 am - 10:30 am

#### General Session: John Boyens – Growing Your Book of Business

**Location:** Boone / Crockett

*Learn the six keys to growing your book of business, proven prospecting techniques, how to quickly qualify/disqualify opportunities and how to create your very own virtual business strategy.*

10:30 am - 11:00 am

Exhibitor Visits & Break | **Location:** Prefunction Area

# DETAILED SCHEDULE

11:00 am - Noon

## Bernie Breakouts:

- **A Crack In the Foundation – Alan Crawford**

**Location:** Ryman Meeting Room 1

**Voluntary benefits to improve well-being.** In this session, Alan Crawford of Guardian will cover the features and benefits of supplemental health insurance products and the role they play in protecting financial security for working Americans. This session is worth 1 SHRM course credit and will also feature an announcement about Guardian's integration with BerniePortal.

- **Think Like a CFO – Brian Tolbert**

**Location:** Ryman Meeting Room 2

**How to channel CFOs when building benefits strategies.** Benefits are typically the largest expense item in a company's budget next to payroll. Traditionally, managing the benefits budget hasn't been like managing other business expenses. In this session, we'll discuss how to "think like a CFO" when it comes to benefits, and improve transparency by applying the same level of scrutiny to healthcare spend.

- **Future of Benefits Advising – Paula Beersdorf, Kelly Belote, Craft Hayes & Grant Hendrickson**

**Location:** Ryman Meeting Room 3

**A panel discussion on the industry's future.** This panel discussion will look into the future of benefits advising, while covering best practices and industry insight, particularly on brokerage operations and benefits strategy design.

Noon - 1:00 pm

**Lunch** | **Location:** Front Atrium

1:00 pm - 2:30 pm

## General Session: Lester J. Morales – Reference-Based Pricing 2.0

**Location:** Boone / Crockett

Reference-based pricing has long sought to rein in costly medical procedures, but there has been collateral damage — lawsuits, employee dissatisfaction, surprise balance bills and collection notices. Version 2.0 of reference-based pricing removes these obstacles and becomes the employee benefit advisor's secret weapon in helping clients and prospects tame the healthcare beast.

2:30 pm - 3:30 pm

## Bernie Breakouts:

- **Prospecting for Gold – Sarah Weinstein**

**Location:** Ryman Meeting Room 1

**How to use BerniePortal to generate quality leads.** Are you maximizing technology as a lead generation tool? In this session, we'll cover tips for adding BerniePortal to your website, lead generation best practices, and how to utilize BerniePortal's lead generation opportunities.

- **Meta-Planning for BerniePortal – Alex Tolbert**

**Location:** Ryman Meeting Room 2

**What's next in BerniePortal's product roadmap?** BerniePortal founder Alex Tolbert will lead two meta-planning sessions (see day 2, March 26 from 2:30pm - 3:30pm for first meta-planning session) focused on choosing what's next in the product roadmap for BerniePortal. The audience will participate in brainstorming areas for improvement or new features BerniePortal should add. You'll have shared direct input into BerniePortal product roadmap, and also learn how to conduct a meta-planning session for your firm.

# CONFERENCE HOTEL

Wifi: [hhonors\\_meeting](#) or [attwifi](#)

Coupon Code: HH19



## Location & Phone Number

Hilton Nashville Downtown, 121 4th Ave. S. Nashville, TN  
(615) 620-1000



## Hotel Accommodations

- On-site fitness center
- Business center
- Four on-site dining options:
  - ▶ Trattoria Il Mulino
  - ▶ Market Street
  - ▶ Symphony Lounge
  - ▶ The Palm



## Parking

- Self parking \$30
- Valet parking \$42
- Street / meter parking



## Directions from Hilton Hotel to Nashville Airport

- ▶ Take I-40 E from 4th Ave. S. (1.2 miles)
- ▶ Follow I-40 E to Terminal Dr. Take exit 216A from I-40 E (5.6 miles)
- ▶ Drive to Terminal Dr. (0.4 miles)
- ▶ Arrive at **Nashville Airport, 1 Terminal Dr, Nashville, TN**



## Taxi Service Phone Numbers


NashVegas Cab: 615-332-3333

Music City Taxi: 615-865-4100



# WEEKDAYS WITH BERNIE QUICK FACTS

## Help / Questions:

Need Assistance? A BerniePortal team member will be stationed at the Help Desk in the registration area for the duration of Weekdays with Bernie. Also, look for BerniePortal team members holding paw print signs  throughout the conference area.

[Location: Prefunction Area](#)

## Client Success Station:

Get some face time with your Client Success team member. Ask any questions you may have, see a feature demo, or just stop by and say hi!

[Location: Prefunction Area](#)

## Networking Hound Lounge:

Recharge your electronics (and yourself) in BerniePortal's Networking Hound Lounge. Enjoy snacks and beverages while you network with other brokers.

[Location: Robertson Meeting Room](#)

## Review Station:

Got 5 minutes? Give BerniePortal a review. Help us invest in you by sharing your experience.

[Location: Prefunction Area](#)

## Photobooth:

Commemorate your Weekdays with Bernie experience. Be sure to share your pictures on social media using #WWB19.

[Location: Prefunction Area](#)

## Awards:

*Congratulations to our Bernie Award winners!*

- **BernieBFF:** Miller Loughry Beach Insurance Services  
*Most engaged with BerniePortal in 2018*
- **BerniePortal Boss:** Sterling Seacrest Partners (Class of 2016), The Ashley Group (Class of 2017), Korthase Flinn Insurance & Financial Services (Class of 2018)  
*Most employees added to BerniePortal*
- **Best-In-Billing:** The Ashley Group  
*Most groups on BernieBill*
- **HR Rockstar:** Borden Insurance  
*Most groups using BerniePortal's HR features*
- **Weekdays with Bernie MVP:** The winner will be announced at 9:00 am on Wednesday, March 27.  
*Broker partner with the most WWB spirit*

# PHOTO SCAVENGER HUNT

Make the most of Weekdays with Bernie with our photo scavenger hunt!\* Explore Nashville, make some new connections and have a little fun for a chance to win a BerniePortal swag bag jam-packed with goodies and printed marketing pieces you can share with your clients and prospects.

## Rules:

- The scavenger hunt begins at the Welcome Reception on Monday, March 25 and ends at noon on Wednesday, March 27. The winner will be announced before the 1:00 pm general session on Wednesday, March 27.
- The person who completes the most items on the list will be the winner. If there is a tie, the winner will be randomly selected.

*Take a photo of as many items on the list as possible, and email them before **noon on Wednesday, March 27** to [bh@bernardhealth.com](mailto:bh@bernardhealth.com).*

*Use the subject line:  
**WWB Scavenger Hunt***

## Items:

- ☐ **Connect with Client Success:** Find your dedicated Client Success team member and snap a picture with them.
- ☐ **Meet our founder and CEO:** Find Alex Tolbert and take a selfie with him.
- ☐ **Show our sponsors some love:** Take a picture with a sponsor at their booth.
- ☐ **Have some photo fun:** Stop by our photo booth and take a picture.
- ☐ **Show some WWB '19 love:** Take a picture in front of the Weekdays with Bernie sign.
- ☐ **Take a break from the 9-5:** Find Dolly Parton and get a photo with her.
- ☐ **Visit the honky tonks:** Take a picture on Nashville's famous neon highway, Broadway.
- ☐ **Make some connections:** Take a picture with a friend in the Networking Hound Lounge.
- ☐ **Visit the review station:** Take a picture of yourself giving BerniePortal a review.
- ☐ **Enjoy Music City:** Take a photo of live musicians.
- ☐ **Brag about your swag:** Take a picture of your favorite item from your registration bag.
- ☐ **Spend some time with Bernie:** Find Bernie and take a picture with him.
- ☐ **Color outside the lines:** Take a picture of your masterpieces on pages 21 & 22 in your program guide.

\*Participating in the scavenger hunt gives the BerniePortal team permission to use these photos for social media and marketing.

# SPEAKER BIOS

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**Alex Tolbert** is the founder and CEO of BerniePortal. Alex began his career as a broker at BerniePortal's sister company Bernard Health, where he saw firsthand the challenges small and mid-sized businesses faced when it comes to benefits and HR.



## KEYNOTE SPEAKER

**Senator Bill Frist, M.D.** is a nationally-acclaimed heart and lung transplant surgeon, former U.S. Senate Majority Leader and chairman of the Executive Board of the health service private equity firm Cressey & Company.



**Andy Bailey** is the founder of entrepreneurial coaching firm Petra Coach, and spends the majority of his time coaching other entrepreneurs, business owners, leaders and teams.



**Paula Beersdorf** is the President of Sun Risk Management, Inc., a strategic business and employee benefits consultancy.



**Kelly Belote, PHR**, is Vice President of Client Services for The Ashley Group. Kelly oversees The Ashley Group's overall strategic direction, growth, profitability, retention and best practices.



**John Boyens** leads The Boyens Group. He is a sales productivity expert and business strategist with 22 years of experience as an executive sales leader.



**Dan Campbell** is a Managing Partner at Campbell Petrie Inc. Dan works with Campbell Petrie's key accounts in both a sales and account management capacity, as well as oversees the firm's finances.



**Alan Crawford** is the regional practice leader for worksite products at Guardian Life Insurance.





**Craft Hayes** leads BerniePortal's sales team. Previously, he was the Nashville market leader for benefits brokerage Bernard Health.



**Grant Hendrickson** is a benefits consultant at Brogan, Reed, Van Gorder & Associates, where he works with business leaders and HR professionals to design and implement robust benefit programs.



**Lester J. Morales** is the CEO of Next Impact LLC, a reference-based pricing consulting company and creator of [RBPricing.com](http://RBPricing.com).



**Mick Rodgers** is Managing Partner of Axial Benefits Group and the founder of The Alliance Healthcare Coalition, a nationally-based healthcare purchasing coalition.



**Jason Silverman** is the founder of BenefitsGuide. He has over 20 years of experience as a group insurance broker and is an expert in using CRMs to better manage agencies.



**Brian Tolbert** leads the employer advisory team at BerniePortal's sister company, brokerage Bernard Health, where he focuses on business development and vision.



**Lindsey Van Cleave** leads BerniePortal's Client Success team and is responsible for helping brokers use BerniePortal, from training to implementation and beyond.



**Sarah Weinstein** leads BerniePortal's Marketing team. She is an expert in lead generation and benefits software marketing strategy.

# RESTAURANTS & ATTRACTIONS

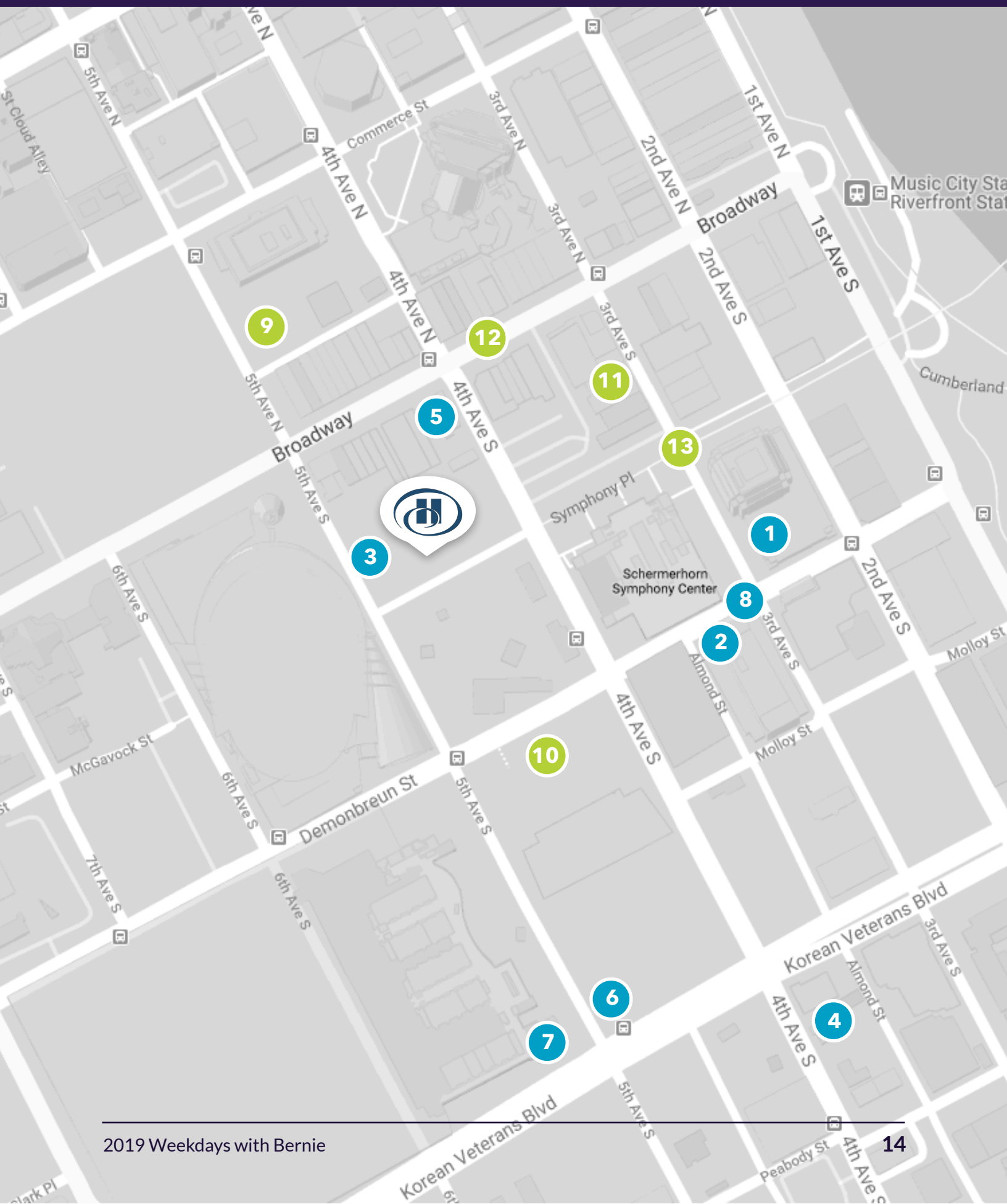
## Restaurants & Coffee

- 1 The Southern**  
150 3rd Ave. S, #110, Nashville, TN  
615-724-1762  
Cuisine: Southern  
[www.thesouthernnashville.com](http://www.thesouthernnashville.com)
- 2 Etch**  
303 Demonbreun St, Nashville, TN  
615-522-0685  
Cuisine: Upscale American  
[www.etchrestaurant.com](http://www.etchrestaurant.com)
- 3 The Palm**  
140 5th Ave. S, Nashville, TN  
\*Located in the Hilton Downtown Hotel  
615-742-7256  
Cuisine: American Seafood & Steakhouse  
[www.thepalm.com/nashville](http://www.thepalm.com/nashville)
- 4 Martin's Bar-B-Que Joint**  
410 4th Ave. S, Nashville, TN  
615-288-0880  
Cuisine: Barbecue  
[www.martinsbbqjoint.com](http://www.martinsbbqjoint.com)
- 5 Merchants Restaurant**  
401 Broadway, Nashville, TN  
615-254-1892  
Cuisine: Southern Bistro  
[www.merchantsrestaurant.com](http://www.merchantsrestaurant.com)
- 6 Bongo Java**  
364 5th Ave. S, Nashville, TN
- 7 Dunkin' Donuts**  
321 5th Ave. S, Nashville, TN
- 8 Starbucks**  
299 Demonbreun St, Nashville, TN

## Attractions

- 9 Ryman Auditorium**  
116 5th Ave. N, Nashville, TN  
*Tour one of Nashville's historic music venues.*
- 10 County Music Hall of Fame and Museum**  
222 5th Ave. S, Nashville, TN  
*Explore the history of America's music at the Country Music Hall of Fame and Museum.*
- 11 The Johnny Cash Museum**  
119 3rd Ave. S, Nashville, TN  
*Walk through the world's largest collection of Johnny Cash artifacts and memorabilia.*
- 12 Downtown Nashville-Broadway**  
Broadway, Nashville, TN  
*Experience the fun and live music of Broadway's honky-tonk bars and shops.*
- 13 Pedestrian Bridge**  
On 3rd and Symphony Place, Nashville, TN  
*Take a walk over the Cumberland River to see the best view in Nashville.*

# MAP OF DOWNTOWN NASHVILLE





# MEET THE CLIENT SUCCESS TEAM



*What's our award-winning Client Success team members' favorite thing about working with clients?*

2019 Customer Service  
Department of the Year Winner



*"Helping clients realize how to use BerniePortal to be more efficient."*  
– Lindsey



*"Establishing long-lasting relationships that continue to grow."*  
– Megan



*"Getting to see clients grow in their adoption of BerniePortal's new features and partnerships."*  
– David



*"Getting positive feedback from my groups' use of BerniePortal."*  
– Cooper



*"Building actual relationships with clients and feeling like a part of their own team."*  
– Eric



*"My favorite part of working with clients is building relationships!"*  
– Ashley



*"Helping my clients create efficiencies for their brokerage and clients by utilizing BerniePortal."*  
– Taylor D.



*"Helping clients find solutions to make their lives easier."*  
– Sebastian



*"The great relationships we form with our clients!"*  
– Taylor B.



*"Building a relationship so we can have more to talk about than just work-related topics!"*  
– Dan



*"Using BerniePortal to help my clients achieve their goals."*  
– John



*"Helping our clients grow in their knowledge and ability to use BerniePortal."*  
– Trey



*"Building great relationships and partnerships with clients."*  
– Courtney



*"Helping them succeed in providing technology to their groups!"*  
– Ben



*"Seeing my clients have that 'Aha!' moment once they figure something out in BerniePortal."*  
– Steven



*"Learning about different benefits that different groups and states offer."*  
– Whitney



*"I love building relationships with my clients and establishing a great rapport."*  
– Lauren



*"Leading demos to showcase BerniePortal's features."*  
– Terrell



# BERNIEPORTAL

## All of HR in one place – finally!

*Contact your Client Success team member for more information on how to add features to your agency's portal and to your clients' accounts.*



### **Applicant Tracking**

Find the best candidates faster by bringing your recruitment online.



### **Onboarding**

First days should be about getting to work, not paperwork.



### **Online Benefits**

Benefits can be complicated, but enrollment doesn't have to be.



### **PTO Tracking**

Don't waste your time tracking your team's free time.



### **Time & Attendance**

Time management without the time commitment.



### **1094-C / 1095-C**

Increase compliance and save time.



### **Payroll Integration**

Integrate with leading payroll providers.



### **Carrier Integration**

Integrate with leading insurance carriers.



### **BernieBill**

Generate bills from benefits providers in real-time.



### **Compliance**

Streamline and track compliance communications across your team.



### **Performance Management**

Communicate and evaluate workplace performance.



### **COBRA Administration**

Take the sting out of COBRA Administration.

# THANK YOU TO OUR SPONSORS

## PLATINUM SPONSORS

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*At Allstate Benefits we're dedicated to protecting individuals and families throughout North America with best-in-class employee benefits, superior technology and compassionate claims administration. With over 40,000 groups in force and insuring more than three million employees, we help customers realize their hopes and dreams by providing the best products and services to protect them from life's uncertainties and prepare them for the future.*



*InfoArmor has led the identity protection and advanced threat intelligence pack for 10 years. We combine our advanced investigative systems with our expertise in working with businesses to ensure companies and their employees remain protected from ever-evolving online threats. Our employee benefit, PrivacyArmor®, is a proactive identity monitoring service that alerts you at the first sign of fraud and fully restores your identity. VigilanteATI, our corporate threat intelligence service, monitors the dark web for emerging threats to protect your company from hacks and cyberattacks.*

## GOLD SPONSOR

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*Unum is a Fortune 500 company of people serving people. We are a market leader in disability, group life, and voluntary benefits. Our products and services meet the needs of a diverse workforce that includes four generations, growing ethnic diversity and changing family dynamics.*

## BRONZE SPONSORS

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*Paycor was founded because we believed that with the right tools and support, HR practitioners could make a major contribution. Paycor is known for delivering modern, intuitive recruiting, HR and payroll solutions for more than 30,000 medium-sized and small businesses— but what makes us legendary is our singular focus on helping business leaders, entrepreneurs and HR professionals make a real difference in their organizations.*



*The TRUE Network offers independent employee benefit firms a unique collaborative experience. This collaboration allows our members to share best practices in consulting, operations, sales, leadership, and agency management.*



*Proliant powers the #PeopleFirst Economy. We deliver fully integrated, cloud-based people tools that simplify payroll and HR processes while improving accuracy and ensuring full industry compliance for over 4,000 customers in multiple industries in all 50 states.*





*The Guardian Life Insurance Company is one of the largest mutual life insurers in America with \$7.4 billion in capital and \$1.5 billion in operating income (before taxes and dividends to policyholders) in 2016. Guardian's firm commitment to mutuality and financial strength has made us a Fortune 250 company, uniquely positioning us to focus on the needs of our customers and their long-term interests first.*



*BenefitsGuide, is a highly customized version of the Salesforce Platform that is specifically designed for the employee benefits broker business. We work with each new subscriber to document tasks performed as part of their typical insurance broker processes and custom build those workflows. The result is a system customized specifically to each subscriber's business requirements.*



*The Benecon Group, based in Lancaster, Pennsylvania, specializes in innovative and effective self-funded employee health benefit programs for companies, governments, and non-profit consortiums and cooperatives. VERIS is Benecon's national health insurance consortium open to employer groups across all industries. Formed in 2011, VERIS provides self-funded benefit solutions to more than 400 employers nationwide.*



*Bottom Line Solutions works with benefit professionals across the country to help them become NextGeneration Benefits Advisers elevating themselves beyond the status quo broker and delivering meaningful results to their employer-clients all while achieving impressive organic growth. Bottom Line Solutions also developed the NextGen Mastermind Partnership which is a collaborative peer-exchange program exclusively for benefits agency owners and principals.*



*With 150 years of experience in the insurance industry and over 90 years in employee benefits, MetLife is a leader you can trust. We serve more than 50,000 U.S. group customers and provide benefits and retirement solutions to more than 90 of the top one hundred FORTUNE® 500 companies. MetLife's customer-focused solutions, exceptional service and proven expertise — combined with the innovative capabilities of our enrollment and technology partners — delivers the right mix of solutions our customers can count on. For more information, visit [www.metlife.com](http://www.metlife.com).*



*Aflac is a Fortune 500 company, providing financial protection to more than 50 million people worldwide. When a policyholder or insured gets sick or hurt, Aflac pays cash benefits fairly, promptly, and often in one day for eligible claims, directly to the insured (unless assigned otherwise). For more than six decades, Aflac voluntary insurance policies have given policyholders the opportunity to focus on recovery, not financial stress.*



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# lucas

isn't thinking  
about his  
benefits  
right now.

And that's exactly how  
it should be.

Because Lucas is already  
on the path to recovery,  
not letting any obstacle  
stand in his way.

Lucas isn't worried about  
his benefits, because his  
company's got Unum.  
To have his back, so he  
can get back on the trail.

Rock on, Lucas.

# we've got ù<sup>TM</sup>

From an accident to an illness to a long-term disability,  
when you've got Unum, we've got you. Get benefits that  
keep your employees going at [unum.com/wevegotu](https://unum.com/wevegotu)

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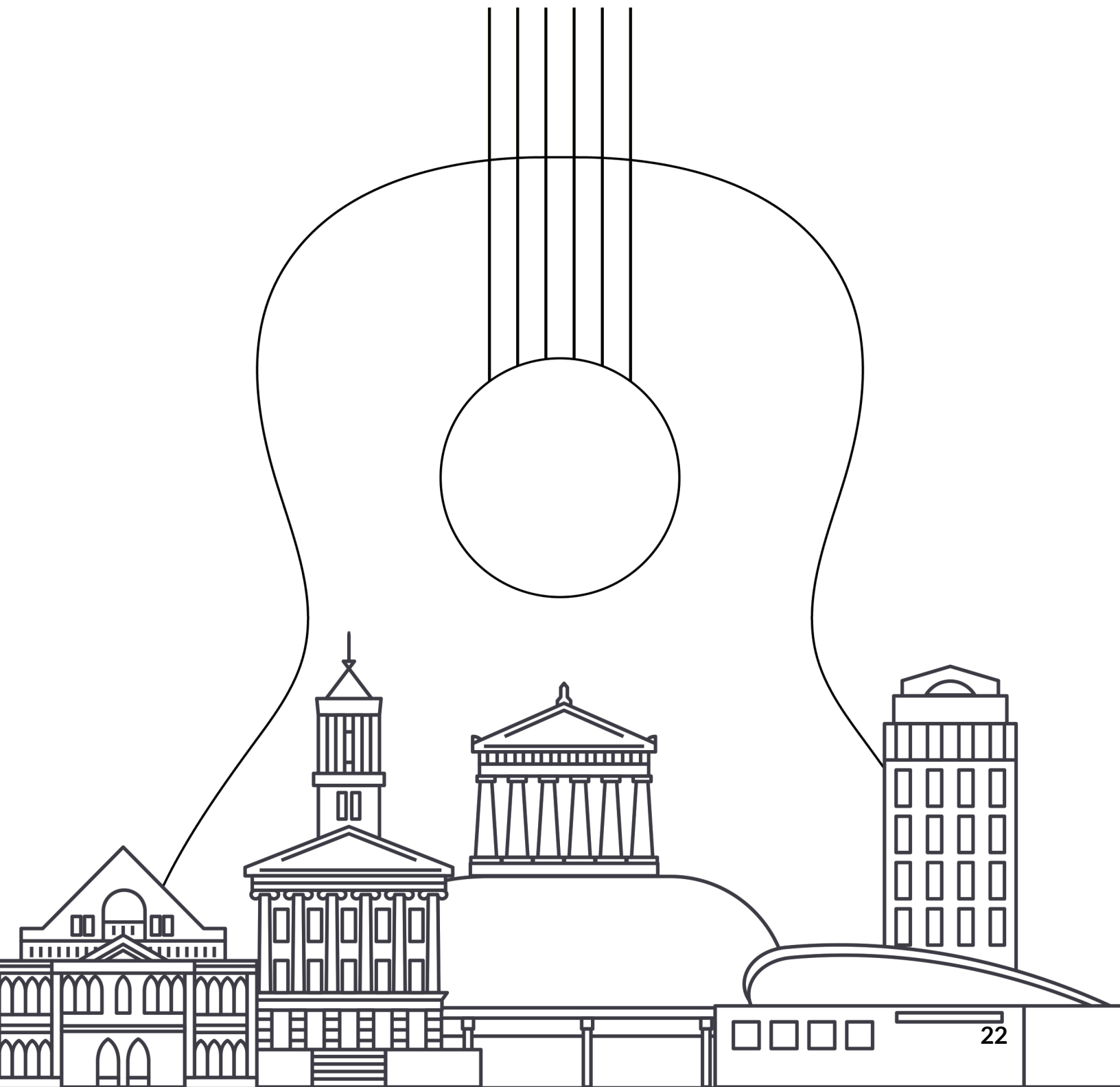


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101-250  
251-500  
501-1000

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