



# Program Guide

May 20-22, 2020 | Virtual Conference

Log in: [WeekdaysWithBernie.vfairs.com](https://WeekdaysWithBernie.vfairs.com)



BERNIEPORTAL



# WELCOME TO WEEKDAYS WITH BERNIE

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Welcome to our first ever virtual conference! We are so glad you're joining us for our largest Weekdays with Bernie yet! 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 virtually bring together leading benefits professionals from around the country for the third 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 two 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 all meetings are via Zoom, 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 opportunities for smart, innovative brokers like you, 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 annual conferences 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,



*Alex Tolbert*

Alex Tolbert  
BerniePortal Founder





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# CONFERENCE SCHEDULE

## DAY 1: Wednesday, May 20 \*Times are in CDT

8:30 am - 5:30 pm	BerniePortal Training (For pre-conference registrants only)
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## DAY 2: Thursday, May 21 \*Times are in CDT

8:30 am - 9:00 am	Opening Remarks: Alex Tolbert, BerniePortal
9:00 am - 10:00 am	Keynote Speaker: John DiJulius, <i>The Relationship Economy</i>
10:00 am - 11:00 am	Exhibitor Visits (Break)
11:00 am - Noon	Bernie Breakouts: <ul style="list-style-type: none"> <li>- 10 Tips to Spend Less on Healthcare</li> <li>- The Road to Meeting 1</li> <li>- Expanding Beyond Benefits</li> </ul>
Noon - 1:00 pm	Lunch
1:00 pm - 2:00 pm	General Session: Dr. Josh Luke, <i>Is Healthcare Bankrupting Your Business?</i>
2:00 pm - 3:00 pm	Bernie Breakouts: <ul style="list-style-type: none"> <li>- Guardian's Supplemental Health Products and BerniePortal/BernieBill</li> <li>- Change Management</li> <li>- Meta-Planning for BerniePortal</li> </ul>
3:00 pm - 4:00 pm	Exhibitor Visits (Break)
4:00 pm - 5:00 pm	BerniePortal Keynote: Alex Tolbert, <i>What's New with BerniePortal?</i>

## DAY 3: Friday, May 22 \*Times are in CDT

9:00 am - 10:00 am	General Session: Mick Rodgers, <i>Tech Titans in Healthcare</i>
10:00 am - 11:00 am	Exhibitor Visits (Break)
11:00 am - Noon	Bernie Breakouts: <ul style="list-style-type: none"> <li>- Dynamic Between Sales &amp; Service</li> <li>- Financial Health &amp; Wellbeing Supplemental Benefits Solutions</li> <li>- Recruiting, Hiring, and Retaining Millennials</li> </ul>
Noon - 1:00 pm	Lunch
1:00 pm - 2:00 pm	General Session: Jeff Spraggins, PHD, <i>Cancer to COVID-19 and Beyond</i>
2:00 pm - 3:00 pm	Bernie Breakouts: <ul style="list-style-type: none"> <li>- Selling Benefits Virtually</li> <li>- Meta-Planning for BerniePortal</li> </ul>



# LOBBY & DETAILED SCHEDULE



## DAY 1 Wednesday, May 20 \*Times are in CDT

8:30 am - 5:30 pm BerniePortal Training – For pre-conference registrants only

## DAY 2 Thursday, May 21 \*Times are in CDT

8:30 am - 9:00 am Welcome / Opening Remarks: Alex Tolbert

9:00 am - 10:00 am **Keynote Speaker: John Dijulius – The Relationship Economy**  
*Technology has provided us with amazing advances, information, knowledge, instant access, and entertainment like never before. However, as convenient as these advances make our lives, they also have changed the way we communicate, behave, and think, and have led to a dramatic decline in people skills. That is why building relationships and genuine connections have never been more important.*

10:00 am - 11:00 am Exhibitor Visits & Break



# DETAILED SCHEDULE

11:00 am - Noon

## Bernie Breakouts:

- **10 Tips to Spend Less on Healthcare – Dr. Josh Luke**  
*In this breakout, Dr. Luke will talk about the shift in control for the hospital sector to the insurance sector and provide you with 10 tips to spend less on healthcare.*
- **The Road to Meeting 1 – Sarah Weinstein**  
*Tools & Best Practices to Grow Your Agency. This breakout will help you grow your agency by teaching you how to generate leads, follow-up, and convert them by leveraging lead generation best practices and strategic marketing tools.*
- **Expanding Beyond Benefits – Craft Hayes**  
*Selling HR Technology and Services with Benefit Strategy. In this breakout, we will cover how to use HR technology to help solve prospects transactional challenges to earn the trust (and time) to help employers with their strategic benefit and cost concerns.*

Noon - 1:00 pm

## Lunch

1:00 pm - 2:00 pm

## General Session: Dr. Josh Luke – Is Healthcare Bankrupting Your Business?

*In this session, Dr. Luke will take this time to speak about best practices and tactics business owners can use to succeed and thrive in the new healthcare financial model.*

2:00 pm - 3:00 pm

## Bernie Breakouts:

- **Guardian's Supplemental Health Products and BerniePortal/ BernieBill – Kyran Quackenbush of Guardian**  
*The breakout will cover an overview of the available Guardian Worksite products and features, details of a unique underwriting offer designed exclusively for BerniePortal brokers, and perspectives from Bernard Health on how they are leveraging these products to enhance their clients' benefits packages.*
- **Who Moved My Cheese – Lindsey Van Cleave**  
*A Discussion on Change Management. For most of our broker partners, BerniePortal was a big change to their current process for managing eligibility. We think it's important to talk about different ways people approach change using the story "Who Moved My Cheese". We'll help you identify your approach and discuss how this could impact your use of BerniePortal both in your agency and with your clients.*
- **Meta-Planning for BerniePortal – Alex Tolbert (Session 1 of 2)**  
*What's next in BerniePortal's product roadmap? BerniePortal founder Alex Tolbert will lead two meta-planning sessions 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 also learn how to conduct a meta-planning session for your firm.*

3:00 pm - 4:00 pm

## Exhibitor Visits & Break

4:00 pm - 5:00 pm

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

*BerniePortal founder Alex Tolbert will share the platform and company's latest updates, including a new product and service level enhancements.*



## DAY 3

Friday, May 22 \*Times are in CDT

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9:00 am - 10:00 am

### General Session: Mick Rodgers – Tech Titans in Healthcare

*When you think of healthcare in America, names like UnitedHealth, Anthem, and Cigna—or newer names such as Haven, Alphabet (Google), Apple Health Records and Uber Health—come to mind. If you're a broker who tends to think of the former more often than the latter, you're not paying attention to the Tech Titans who are poised to reshape healthcare for generations to come.*

10:00 am - 11:00 am

### Exhibitor Visits & Break

11:00 am - Noon

### Bernie Breakouts:

- **Dynamic Between Sales & Service – Brian Tolbert**

*Some believe that organizations from all industries carry a tension between Sales and Service Departments. We'll discuss how Benefit Agencies can better align scope of responsibilities and compensation structures to alleviate unnecessary friction without losing the motivation for revenue growth.*

- **Financial Health & Wellbeing Supplemental Benefit Solutions – Dan Ealy and John Howard of 5Star**

*The use of Supplemental Benefits to manage the financial risks of your clients and their employees. Dan Ealy and John Howard of 5Star will discuss the growing need for supplemental benefits to meet both employer budgetary demands and the increasing financial risks employees face daily.*

- **Recruiting, Hiring, and Retaining Millennials – Ryan McCostlin**

*A panel discussion on the industry's future. In this session, we'll discuss how Millennials differ from previous generations in important ways, and how you don't need an office full of ping pong tables, beer kegs, and participation trophies to find, retain, and get the most out of them.*

Noon - 1:00 pm

### Lunch

1:00 pm - 2:00 pm

### General Session: Jeff Spraggins, PH.D. – Cancer to COVID-19 & Beyond

*Precision medicine brings together molecular diagnostics, medical imaging, and machine learning to discover disease subtypes and tailor treatments to the individual. Jeff Spraggins, Director of Research for the Biomolecular Multimodal Imaging Center at Vanderbilt University, will highlight emerging imaging technologies that are being developed at VU to support precision medicine. These novel multimodal molecular imaging technologies have the potential to uncover the driving biology behind human disease including cancer, COVID-19, and more.*

2:00 pm - 3:00 pm

### Bernie Breakouts

- **Selling Benefits Virtually – Brian Tolbert**

*In the time of the unknown, businesses around the world are struggling with the disruption of the day-to-day. This is a new world for us, and we need to find new ways to better our marketing and sales efforts. Join us as Bernard Benefits Leader, Brian Tolbert, shares how his team is keeping calm and maintaining a strong pipeline during the outbreak.*

- **Meta-Planning for BerniePortal – Alex Tolbert (Session 2 of 2)**

# WWB QUICK FACTS

## ***The Advisor Success Zoom Help Desk:***

Whether you have a BerniePortal question, or just want to say “hi,” visit our Advisor Success Team at the Advisor Success Zoom Help Desk during Exhibitor and Lunch Breaks using the links and passwords below!

### **Join Thursday's Help Desk:**

- **Meeting ID:** 959 5636 2451
- **Password:** Bernie321

### **Join Friday's Help Desk:**

- **Meeting ID:** 997 1539 2568
- **Password:** Bernie321

## ***The Virtual Lobby:***

Cool, huh? Mimicking the dynamics of a physical conference, you can navigate around all areas of the conference from our lobby.

## ***The Virtual Auditorium:***

Attend and view upcoming general sessions and breakout sessions with live Q&A!

## ***The Virtual Networking Lounge:***

Kickstart conversations with other attendees using text, audio, and video chats, in a 1:1 or a group chat setting.

## ***The Virtual Exhibit Hall:***

Visit our Weekdays with Bernie Sponsors in the Exhibit Hall and learn more about the awesome products and services they offer!

## ***The Virtual Info Desk:***

Just like an actual conference, visit our Virtual Info Desk for guidance from vFairs representatives around the virtual conference!





# VIRTUAL WEEKDAYS WITH BERNIE FAQs

**I can't find my registration email from vFairs. What website do I go to?**

**[WeekdayswithBernie.vFairs.com](https://WeekdayswithBernie.vFairs.com)**

**Got it, now how do I log in?**

*Select "Login" in the top right corner and enter the email address that you used when you purchased your ticket. (no password required)*

**Wow, it looks just like a hotel lobby—impressive! What should I do first?**

*Select the Program Guide button in your navigation bar. Download and review so that you are prepared with all of the need-to-know conference information, including a detailed look at the conference schedule.*

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 Lobby |  Exhibit Hall |  Auditorium |  Lounge |  Leaderboard |  Program Guide |  Video Vault |  Resources |  Swag Bag |  Networking

**Okay, now that I've downloaded the Program Guide, what's next?**

*Join us in the virtual Auditorium for opening remarks and to hear our keynote speaker!*

**It's time to pick a Breakout Session to attend. Do you have any recommendations?**

*Attend any session that sparks your interest! Your Weekdays with Bernie login will stay active for 30 days following the event, allowing you access to any session that you may have missed—and all of the conference collateral.*

**We have an exhibit booth break now. What are my options?**

*We highly recommend visiting our Sponsors in the exhibit hall, found in your navigation bar. Did we mention you earn points on our Leaderboard for this?*

*Your other option is to visit your Advisor Success Team Member at the Zoom Help Desk, even if it's just to pop in and say hello!*

**Join Thursday's Help Desk:**

- **Meeting ID:** 959 5636 2451
- **Password:** Bernie321

**Join Friday's Help Desk:**

- **Meeting ID:** 997 1539 2568
- **Password:** Bernie321

# VIRTUAL WEEKDAYS WITH BERNIE FAQs

## **Oh, so there's a Leaderboard! What do I have to do to win?**

*Check out our point system and keep track of the standings by selecting Leaderboard in your navigation bar. Want more points? Engage with our sponsors, ask questions, and attend the sessions!*

## **If I have any additional questions, should I contact the Advisor Success Zoom Help Desk or the Info Desk in the virtual lobby?**

*It depends on what kind of question you have! Any questions that are vFairs software related, please visit the Info Desk in the virtual lobby. If you have questions that are BerniePortal or conference schedule related, please visit the Advisor Success team via the Zoom Help Desk!*

## **Lunch time—just what I've been waiting for!**

*Us too! While we're sad that we can't host you in Nashville, we've put together some great, locally inspired lunch ideas for you. Check them out on page 14!*

## **The conference has officially ended. Are there plans for next year?**

*Stay tuned and keep an eye on your inbox! Save the dates will be sent out before you know it.*

## **Great. Before we go, are there any other important details worth keeping in mind?**

*Save the website and your login information! Come back and access every session and all of our collateral for up to 30 days following the event.*

## **See you next year!**

# VIRTUAL LEADERBOARD

## *What's a virtual event without a little twist?*

*Our Virtual Leaderboard allows you to earn points based on the below point system, all while keeping you engaged and active throughout the duration of the conference!*

*Did we mention—the Leaderboard winner will receive an awesome prize following the completion of the conference?*

*Click on the Leaderboard tab in your navigation bar at the top of your screen to keep track of where you stand against other attendees!*



## Point System

<b>Logging in to Weekdays with Bernie</b>	10 points
<b>Visiting an Exhibitor Booth</b>	20 points
<b>Downloading Exhibitor Documents</b>	20 points
<b>Watch a Video at an Exhibitor Booth</b>	20 points
<b>Interact with an Exhibitor via Chat</b>	40 points
<b>Attend a Concurrent Breakout Session</b>	30 points
<b>Attend a General Session</b>	30 points



## **Award Winners:**

*Congratulations to our Bernie Award winners!*

- **BernieBFF: Most engaged with BerniePortal in 2019**



- **BerniePortal Boss: Most employees added to BerniePortal**



- **Best-In-Billing: Most groups on BernieBill in 2019**



- **HR Rockstar: Most groups using BerniePortal's HR features in 2019**



- **Weekdays with Bernie MVP: Broker partner with the most WWB spirit**



# GENERAL SESSION SPEAKER BIOS

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## **KEYNOTE SPEAKER**

**John DiJulius** is redefining customer service in corporate America today. As a speaker, international customer experience consultant, and best-selling author, John's keynotes and workshops are used by world-class service companies to provide unforgettable customer service every day.



**Alex Tolbert** is the founder and CEO of BerniePortal, the all-in-one HRIS for small and mid-sized businesses. He is an industry-recognized expert on HR technology, the benefits industry, small business operations, and software development.



**Dr. Josh Luke** is a healthcare futurist and former hospital CEO. He's a best-selling author, podcast host, and speaker who exposes the long-kept secrets of the healthcare trade to help businesses and families keep healthcare from bankrupting their American Dream.



**Mick Rodgers** is Managing Partner of Axial Benefits Group and the founder of The Alliance Healthcare Coalition, a nationally based healthcare purchasing coalition. Mick has been called a pioneer and a disrupter and is one of the country's top healthcare strategists.



**Jeff Spraggins, Ph.D.**, Jeff Spraggins is a Research Assistant Professor in the Department of Biochemistry and is a member of the Mass Spectrometry Research Center at Vanderbilt University. He received his B.A. in Chemistry from the College of Wooster and his Ph.D. in Analytical Chemistry from the University of Delaware (2009).

# BREAKOUT SESSION SPEAKER BIOS

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**Kyran Quackenbush** is the Specialty Markets Channel Manager for Guardian Life. He manages Distribution Partner relationships including health plans, other insurance carriers, healthcare exchanges and benefit marketplaces, association and affinity groups, third party administrators, and managing general agencies.



**John Howard** has worked in many facets of the employee benefit industry including self-funded medical, alternative workforce healthcare, supplemental benefits and ancillary wellness services. John is the Director of Specialty Partners at 5Star Life Insurance where he is responsible for developing partnerships across the country to deliver life and health supplemental benefits with the hope of securing a financial wellbeing for the employees of his clients.



**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.



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



# THE NASHVILLE EXPERIENCE

Although this year's conference is virtual, you can still savor the distinct and iconic flavors of Nashville's drinking & dining scene, while experiencing Music City's legendary live musical performances, even from afar.

## Breakfast:

Start your day off right with a Nashville icon: the legendary [Loveless Cafe](#), home to the biscuit that's satisfied countless appetites. Fortunately, you can [order their biscuit mix along with their delicious preserves online](#) for a breakfast combination that you won't soon forget. They also have an [extensive recipe selection](#) featuring items like [Pimento Cheese & BBQ Pork Nachos](#) and their refreshing [Blueberry Bourbon Smash](#).

## Coffee Break:

Our favorite neighborhood coffee shop, [Frothy Monkey](#) has just what you need to stay energized. Their signature [12South Blend](#) is a medium-roast with a great body and hints of chocolate, hazelnuts, and red apples. The roaster also features a [full menu](#) and [wholesale services](#) for offices and cafes.

## Lunch:

A short walk down from Broadway and you'll find [Martin's Bar-B-Que Joint](#). Chances are you'll smell it before you see it, as their West Tennessee-style, whole-hog barbecue fills the Downtown air from blocks away. While their [amazing beer garden](#) is currently closed, you can still [take home delicious sauces and rubs](#).

## Happy Hour:

After eight years and 86 unique versions of their Hop Project series, Nashville natives [Yazoo Brewing](#) finally nailed it with their [Hop Perfect IPA](#). Brewed with pale barley, oats, and wheat—and featuring Mosaic and Citra hops—the beer provides the perfect taste of Tennessee.

For the cocktail drinker looking to unwind at home after a day of virtual conferencing, try one of [Nashville Craft Distillery's](#) many [at-home recipes](#). A local favorite is the Gold Mint Julep, which pairs bourbon and mint into a winning cocktail combo fit for a sunny afternoon.

## Dinner:

Aside from country music and late nights down on Broadway, there's hardly a more fitting representation of modern Nashville culture than hot chicken. Now, you can [make this spicy, savory dish yourself](#). Be warned though: it's a slow burn that doesn't let up, depending on the heat level. And if your spice cabinet is lacking the required heat, check out [Batch Nashville's](#) hot [chicken spice gift box](#) to get started.



# THE NASHVILLE EXPERIENCE

## Nightcap:

While the hot chicken is still bringing the heat, Nashville has the perfect chaser to cool your palate. With origins around Midtown Nashville's legendary watering hole **Broadway** **Brewhouse**, The Bushwacker has long been the go-to drink to jumpstart a hot summer night for locals and bachelor/ette parties alike. Fortunately, you can make your own at home with **this recipe**.

## Must-see Music City Performances:

Catch live shows from the comfort of your home courtesy of some of Nashville's most well-known and beloved venues and performers.

- **Robert's Western World**  
Streaming nightly sets on Facebook Live.
- **Nick Howard**  
Streaming daily on Facebook Live.
- **Drew Holcomb Kitchen Covers**  
Streaming nightly on Facebook and Instagram Live.
- **Whiskey Jam (now Risky Jam)**  
Monday and Thursday nights on Instagram Live.
- **AJ's Good Time Bar**  
Streaming nightly on Facebook Live.
- **Tin Roof Broadway**  
Streaming weekly on Facebook Live.
- **Tin Roof Demonbreun**  
Streaming weekly on Facebook Live.
- **Tennessee Brew Works**  
Streaming weekly on Facebook Live.

## Nashville Playlist:

Since you couldn't come to Nashville, we thought we'd bring Nashville to you! Check out our Nashville playlist to help you focus and soak up Music City's unique energy. Click the button below to open the playlist on Spotify!



The Nashville  
Experience





# MEET THE ADVISOR SUCCESS TEAM

2019 Customer Service  
Department of the Year Winner

**What are some things our award-winning Advisor Success team members like about working with Broker Partners?**



*Seeing our broker partners use BerniePortal to grow their business and work more effectively.*  
– **Lindsey Van Cleave**



*The different relationships I form with each client.*  
– **Maddie Mahoney**



*Helping them find solutions that not only help their business, but also help their employer clients find success.*  
– **Taylor Dennis**



*I love seeing my clients' growth and confidence as they learn more about BerniePortal.*  
– **Sandra Azubuiké**



*Creating meaningful connections and relationships to further partner's success.*  
– **Trey Williamson**



*I love getting to know industry professionals from all over the country!*  
– **Tejas Reddy**



*My favorite part about working with broker partners is the relationship building aspect!*  
– **Millie Hoffmann**



*When clients feel relieved after solving an issue that they have been trying to fix.*  
– **Kyra Davis**



*Helping Broker Partners succeed with BerniePortal.*  
– **John Googe**



*Building long-lasting relationships with Broker Partners.*  
– **Ladarius Banks**



*Working with my clients is learning more about their businesses and helping them grow as an agency.*  
– **Josh Schmook**



*Relying on each other in order to reach our shared goal. Plus collaboration and teamwork.*  
– **Ibrahim Ezzeir**



*Developing a relationship with my clients outside of insurance.*  
– **Dan Cox**



*All the interesting, fun and quirky personalities that I have the pleasure of working with!*  
– **Nate Chung**



*Talking and connecting with clients and feeling like I'm making a positive impact on their business/clients.*  
– **Amanda Loughran**



*Working together to make BerniePortal work for them. Seeing satisfaction with both parties at the end of 1-1 meetings.*  
– **Josh Dodd**



*Building strong relationships with Broker Partners.*  
– **Sebastian Laboy**



*The excitement we both feel when we know we are going to make things so much easier for them.*  
– **Adam Hoskins**





# 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.



### **Integrations**

Integrate with leading insurance carriers & payroll providers.



### **Performance Management**

Communicate and evaluate workplace performance.



### **Compliance**

Streamline and track compliance communications across your team.

# THANK YOU TO OUR SPONSORS

## 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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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. We uphold the Good Hands® promise every day.



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 5Star Life Insurance Company (5Star Life) has a proud and unique heritage as a related enterprise of the Armed Forces Benefit Association (AFBA). You can be assured of our financial stability and know we will be here to keep our promise and pay claims when the time comes. Our corporate strategy focuses on ensuring measured, profitable growth that enables us to be sustainable over the long term.




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.



New Benefits is the leading provider of the best health, wellness, personal security, financial, travel, and leisure benefit solutions and services—delivered by passionate people who partner with engaged brokers, organizations, and members. We serve associations, insurance companies, banks, credit unions, brokerage/consulting firms, insurance agencies, TPAs, and employers.





# 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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**unum**<sup>®</sup>



# Alpine

Third Party Administration services for small and medium-sized employers.

*Simplify your benefits administration!*



## BerniePortal Integration

No cost integration with BerniePortal is included



## Aligned Support

Our support model is aligned with your BerniePortal Success Team



## Mobile App

Employees can use their Alpine benefits via our iOS or Android app



## Robust Offering

Alpine administers HSAs, FSAs, Dependent FSAs, Parking, Transit benefits as well as COBRA



## Speedy Reimbursement

Approved claims are reimbursed within days via direct deposit



## Investment Options

Employees can invest HSA funds in self-directed investment options



## Single Visa Card

Employees receive a single smart card for all account-based plans that knows which expenses are eligible under your plan



## Powerful Technology

Alpine is powered by technology from WEX Health, the leading technology platform for TPAs



## Compliance Secured

We are a fully licensed and bonded third party administrator



Learn more about Alpine today!



[www.AlpineTPA.com](http://www.AlpineTPA.com)

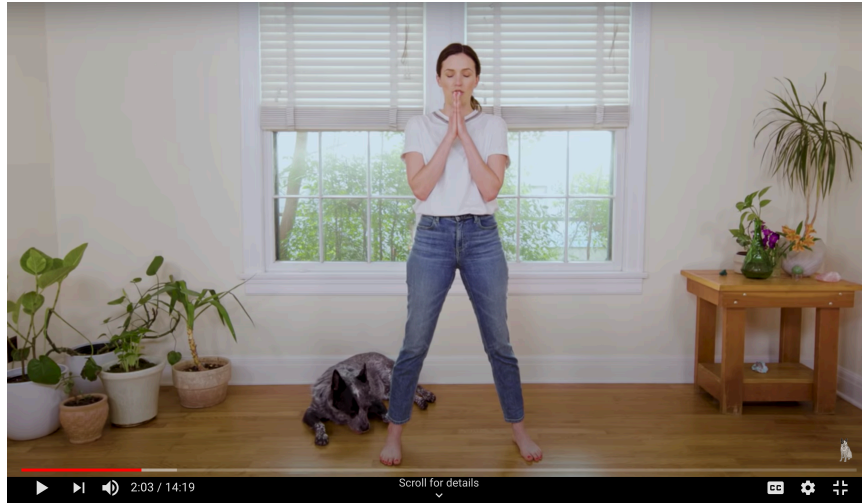


1.833.357.1200

*Weekdays with Bernie has hour-long breaks scheduled throughout the day. During these breaks it's important to refresh your mind and body. We've developed a few fun exercises to help you recharge for the day.*

## Desk Detox:



*We know virtual conferences can cause you to sit at your desk for long periods of time. Be sure to stand up and take a break from time to time. Here are a couple desk detox workouts for you to try at home.*



## [Office Break Yoga \(14 minutes\)](#)

# Office stretches

Prevent fatigue, discomfort, and musculoskeletal disorders caused by seated office work with these stretching exercises. **Consider doing these periodically during the day.**

<h3>Chest and trap stretch</h3>  <ul style="list-style-type: none"><li>Place your hands behind your head above your neck and interlock your fingers.</li><li>Squeeze your shoulder blades together and bring elbows back as far as you can.</li><li>Hold for 15 seconds.</li><li>Relax and repeat.</li></ul>	<h3>Forearm stretches</h3>  <ul style="list-style-type: none"><li>With your right elbow straight, raise your right arm to shoulder height.</li><li>With your left hand, pull your fingers back towards your face. Only apply enough tension to feel a slight stretch in your forearm.</li><li>Hold for 15 seconds then relax.</li><li>Grasp the back of your right hand with your left hand and gently pull your fingers down toward the floor.</li><li>Only apply enough tension to feel a gentle pull along the top of your forearm.</li><li>Hold for 15 seconds then relax.</li><li>Repeat with your other hand.</li></ul>
<h3>Shoulder shrugs</h3>	<h3>Shoulder stretch</h3>

## [Quick Stretches Guide \(download\)](#)

## Coloring Me In:

*Did you know coloring has therapeutic potential to reduce anxiety, create focus, and bring more mindfulness? **[Download our coloring book here to give it a try.](#)***



# BERNIEPORTAL

## Broker Partner Network

*BerniePortal just launched the BerniePortal Broker Partner Network, a way to drive employer leads by virtue of your relationship with BerniePortal.*



## Bernard Benefits

Broker Category: [Group Benefits](#), [HR Consulting](#), [HR Software Support](#), [Individual Under-65 Health](#), and [Medicare](#)

[Profile](#) [Photos](#) [Map](#) [Reviews](#)

### Bernard Benefits–Nashville, TN

Bernard Benefits is a fast-growing benefits brokerage and HR software company that helps employers evaluate and implement solutions that save money and maximize offerings. The company's team of healthcare experts provides strategic health insurance advice to employers in Nashville, Austin, and Indianapolis, and to individuals across the U.S.

[Send Inquiry](#)

Practice Area(s): [Group Benefits](#), [HR Consulting](#), [HR Software Support](#), [Individual Under-65 Health](#), and [Medicare](#)

Client Employee Size:  
2-100

101-500

Address: 2817 West End Ave  
Nashville  
Tennessee  
37203

Phone: 8005050750

[Website](#)

### Why should you join?

1

[Free membership and account set-up](#)

3

[Client reviews](#)

2

[Employer referrals in your area](#)

4

[Search Engine Optimization](#)

**Ready to join? Visit the Help Desk to set up your BerniePortal Broker Partner Network account.**

**Join Thursday's Help Desk:**

- Meeting ID: 959 5636 2451
- Password: Bernie321

**Join Friday's Help Desk:**

- Meeting ID: 997 1539 2568
- Password: Bernie321

**[www.bernieportal.com/broker-directory-login](http://www.bernieportal.com/broker-directory-login)**