

IGOE ADMINISTRATIVE
SERVICES

CORPORATE OVERVIEW

WHERE SERVICE MATTERS!



IGOE'S MISSION

Igoe is an employee owned, customer-driven company (located in San Diego, CA) that is built on a foundation designed to promote personalized service in order to build **long term partnerships**. This requires **accountability** and **personal interaction**.

We believe we can achieve our mission by working as a team with our clients and by meeting our service commitments accurately and on time. At Igoe, **integrity** is paramount. We do what we say we will. Period. Our commitment to **teamwork** is shown through our **respect** for all of

the various people involved in the services we offer (employers, participants, brokers, and our own employees).

As we seek to improve the quality of life for all of these individuals, we focus our attention on providing premier administrative solutions that continually identify and meet the needs of our customers, colleagues and local community.

Simply stated – our mission is to provide **quality service** to our partner-clients while also providing superior **quality of life** to our partner-employees.



INTEGRITY IS
THE BASIS OF
EVERY IGOE
PARTNERSHIP.

WHO IS IGOE?

- Founded by Mike Igoe in 1977
- Privately owned
- Located in San Diego, CA
- Operated by an executive management team of employee owners
- Organically grown solely through the strength of partner referrals
- Committed to a partnership based business engagement model which requires consistency and stability



Experience.....collectively over 200 years of it within in our ownership team alone!



First-Class Technology Partners



Strong Commitment to Personal Relationships

- 98% Client Retention Rate
- 10% growth year over year
- Over 1,500 independent client relationships
- Serving over 50,000 spending account members across all 50 states
- 10% of our clients started services with Igoe over 25 years ago

IGOE'S PARTNER COMMITMENT

We are committed to our **CUSTOMERS** - we earn customer loyalty through listening, anticipating needs, and acting to create value.

We are committed to our **EMPLOYEES** - we encourage and reward innovative thinking, we support work-life balance, and we invest in the development of our employees through education and training.

We are committed to our **COMMUNITY** - we provide administrative solutions that help leverage our business partners and improve both their bottom line and ours.

**SIMPLY STATED...
WE CARE ABOUT ALL OF
OUR PARTNERS:
EMPLOYEES, BROKERS,
CLIENTS AND MEMBERS**



IGOE'S SERVICES

- COBRA
- Direct Billing
(Retiree, LOA, etc.)
- Premium Only Plan Documents
- Commuter Benefits
(Transit/Parking)
- FSAs (Limited/Full Health FSAs)
- Dependent Care Assistance Plans
- HRA
- HSA

A close-up photograph of a person's hand holding a white rectangular sign. The person is wearing a blue suit jacket and a red tie. The background is a blurred grey. The sign contains the text "Let us work for you!" in a bold, black, sans-serif font.

**Let us work
for you !**

IGOE'S SERVICES INCLUDE

- Dedicated Client Relations Manager
- Executive Sponsor
- Service Guarantee
- On Site Call Center
- Open Enrollment
- Real-time systems
- Online Portals: members, employers and broker
- 3 year initial fee guarantee
- 30 day at will termination provision
- Ongoing Training
- Monthly Reporting
- Ad Hoc Reporting
- COBRA Notices: New Hire and Qualifying Event Notices
- COBRA Carrier Eligibility Updates
- COBRA Online Enrollment and Payment Options
- COBRA Premium Remittance
- Mobile App (FSA/HRA/HSA/Commuter)
- Plan Documents
- NDT (Annually)
- Stacked Benefit Cards (2 per account)
- Direct Deposit
- EDI Development (fees apply if added after implementation for initial development and testing)