



# Small Account Solutions for Benefits Brokers

Managing small groups more efficiently.

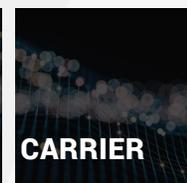
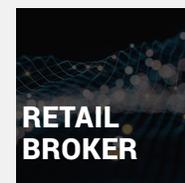
We understand the amount of time managing small groups can take from your staff. Patra's small group solutions extend your ability to address a high volume of incoming small account leads without compromising your ability to service key agency accounts. Patra seamlessly integrates with your agency, allowing you to aggressively grow your books and maximize profits.

- ☑ Dedicated account staff
- ☑ Comprehensive account management
- ☑ Guaranteed profit margin
- ☑ Increased capacity for existing staff
- ☑ Account rounding and new business support
- ☑ Regular compliance updates
- ☑ Access to ThinkHR

 *Small group will be part of our business for years to come. Patra Select Benefits provides a solution for these small groups. Patra services them and keeps them happy while we end up with a more profitable and sustainable model.*

**Tom Polenzani**  
Director of Employee Benefits - Bolton and Company

## Markets Served



# Questions about Patra Select

## How will Patra Select help my agency?

Patra's experienced account service team, dedicated to your book of small and select accounts, enables you to redeploy staff resources and focus on key revenue-producing accounts. Your Patra team will manage every aspect of your book, from answering calls and managing eligibility changes to marketing new business and rounding accounts.

## Are customer relationships affected?

Your customers will continue to see your agency as their benefits partner. Patra will tailor a white labeled or co-branded communication plan addressing your existing staff and small group customers. Patra's years of experience in transitioning books of accounts to dedicated account management staff has taught us that with good communication to your customers, there will be no disruption in service.

## What makes Patra the right partner?

Patra's staff of experienced employee benefit account managers work exclusively on your business, managing your small employer group clients with the same care and expertise as your staff. In addition to personalized service, your customers will also receive exclusive access to ThinkHR's human resource tools and compliance library, as well as deeply discounted access to Flock's HRIS system.

## How do I get started?

It's simple to get started with Patra Select. The first step is for Patra to assign your firm an implementation consultant who will guide the process. Your Patra implementation consultant will:

- › Meet with agency staff
- › Define parameters of book to be managed
- › Initiate communication plan to agency, carriers and customers
- › Transition account service to Patra Select

## Patra Select at a Glance

**\$220M**

Select Premium  
Managed

**70,000**

Select Policies  
Managed

**\$94M**

Select New  
Business Premium

**200+**

Licensed  
Agents

**0**

E&O Claims

**2,605**

INC 5000  
Ranking

**PATRA**<sup>TM</sup>

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It's that simple. Get the ball rolling by reaching out to Patra  
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