

Policy Holder Services

Executive Focus

Employees applying for supplemental insurance protection experience an informative simple process built on state-of-the-art technologies and augmented by highly qualified benefit plan administrators.

Executive Insurance Plans High Touch Services Remove Hurdles

The expectations of our clients and their executives have created an environment at Balser that is responsive, smart and effective. Our objective is to provide plan administration that supports plan sponsors through our people, systems and technology. Combining organization and innovation are essential elements in the success of administering these benefit plans. Our methods and procedures have been honed over decades to accommodate the unique features offered by flexible plan designs. We offer state-of-the art enrollment and administrative systems.

The screenshot displays the IPAX Administration web application in a Microsoft Internet Explorer browser. The address bar shows the URL: <https://www.balserservices.com/ipax/index.cfm?pageAction=planInfo&participant=5190&plan=4>. The application interface includes a search bar with fields for Last Name (Sample), Participant ID, Policy Number, and Plan Name. Below the search bar, there are tabs for Participant Information, Participant Detail (selected), Proposals, Policies, and Company Plans. The main content area shows the participant's address: 1234 Center Avenue, Atlanta, Georgia 30291. The selected tab, Participant Detail, displays information for a Voluntary Supplemental Disability Insurance Plan. The Plan Specific Information table includes the following data:

Plan Specific Information	
Participant ID:	5190
EEID:	
Title:	MGR RETIR PLAN/BENEFITS ADMIN
Division:	Corporate
Location:	
Hire Date:	03/29/1999
Eligibility Date:	09/27/2005
Eligible Class:	Guaranteed Issue
Plan Status:	Eligible
Status Date:	09/26/2005
Plan Year:	2005
Salary:	\$93,200.00
Bonus:	\$8,542.00

There is also a section for Participant Detail Notes with an Add Note button.

Balser maintains information on the policy(ies) issued to those employees who are active in the plan. The profile contains information on premiums and insured benefits. As policy upgrades are issued, benefit and premium amounts are tracked on an incremental basis. That is, the original policy record will show the original premium and benefit. Each upgrade record will show the additional amounts only. The cumulative total will be displayed on the participant's policy screen.

