Communicate | Advocate | Support | Educate (CASE)

CASE
Program

Launching and Establishing Support

TRANSITIONS Benefit Group

800.936.1405
accountsupport@transitionsrbg.com
www.transitionsrbg.com

*We help your team navigate Medicare **with confidence**!*

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About Us and Our Mission

Welcome to Transitions Benefit Group (TBG)

At TBG, **we collaborate with organizations to simplify Medicare and retirement planning**. Our approach is centered on education, guidance, and year-round support — helping your team organization move confidently from early questions to complex decisions.

We're more than a service provider — we're a long-term partner. Our mission is to build lasting relationships by being a reliable resource for your employees as they navigate Medicare, Social Security, and retirement planning.

Whether they're just getting started or preparing to make key life decisions, **our team is here to listen, guide, and support every step of the way**.

Our Mission: ***Navigating Medicare complexities, delivering simplicity!***

Meet Your Support Team:

You'll have a team dedicated to your organization's success, including:

- **Account Manager**
- **Account Coordinator**
- **Licensed Insurance Agent**
- **Dedicated Social Security Advisors**

Partnership Best Practices

To drive awareness and maximize utilization, we recommend:

- **Featuring TBG in your Employee Benefit Guide**
- **Promoting services internally via:**
  - ***Company newsletters***
  - ***Manager or team leader communication***
    - *Keeping us informed on key organizational changes*
    - *Using TBG as a ready resource for Medicare and retirement questions*
  - ***Weekly updates or digests***
  - ***TBG provides for internal use:***
    - *Digital TV Ads*
    - *Email templates*
    - *Digital Banners*

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Launch Timeline and Next Steps

Your personalized onboarding journey includes:

- **Launch Call**
- **Service Agreement Finalization**
- **Employee Census Submission**
- **Marketing Materials Delivery**
- **New Account Setup (NASU) and invoicing link**
- **Benefit Guide / SBC Review**
- **Communication Plan Setup**

Implementation Timeline

1. **One month prior to Launch Call**
   - Introductory Call
2. **Two Weeks prior to Launch Call**
   - Account set up
3. **During Launch Call**
   - Communication plan set up
   - Marketing materials provided
4. **One Week After Launch Call**
   - Paperwork
   - Finalizing outreach campaigns

What's Ahead:

- **Regular touchpoints with your TBG account team**
- **Ongoing year-round communication planning**
- **Biannual utilization reviews and reporting**
- **Responsive support for employees and HR**
- **TBG newsletters**

Invoicing Details

Initial Invoice sent after NASU form is received *(includes W-9 and ACH letter)*

- **Submit NASU form:** *https://www.tbgplanadmin.com/nasu*
- **Whitelist Emails:**
  - *message-service@sender.zohoinvoice.com*
  - *accountsreceivable@transitionsrbg.com*
- **Invoice Timing:** Sent the month before service starts, per billing schedule
- **Payment:** Email remittance to *accountsreceivable@transitionsrbg.com*
- **Support:** Contact the email above and CC your Account Manager

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We appreciate *your attention to this process and look forward to working with* ***you****.*

We're excited to launch this partnership and support your team every step of the way. *Have questions?* Don't hesitate to reach out — we're here to help!

Learn about us and how we can serve you!

SCAN NOW