

Communicate | Advocate | Support | Educate (CASE)

CASE Program

Launching and
Establishing Support



 800.936.1405

 accountsupport@transitionsrbg.com

 www.transitionsrbg.com

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

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:

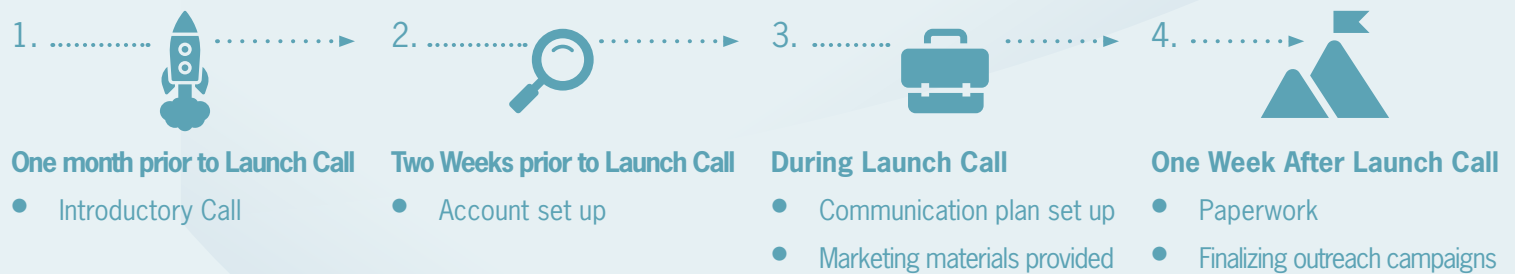
- ✔ **Featuring TBG in your Employee Benefit Guide**
- ✔ **Promoting services internally via:**
 - **Company newsletters**
 - **Manager or team leader communication**
 - ◇ Keeping us informed on key organizational changes
 - ◇ Using TBG as a ready resource for Medicare and retirement questions
 - **Weekly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

Launch Timeline and Next Steps






Your personalized onboarding journey includes:

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

Implementation Timeline



What's Ahead:

-  **Regular touchpoints with your TBG account team**
-  **Biannual utilization reviews and reporting**
-  **Ongoing year-round communication planning**
-  **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>
- **Invoice Timing:** Sent the month before service starts, per billing schedule
- **Whitelist Emails:**
 - message-service@sender.zohoinvoice.com
 - accountsreceivable@transitionsrbg.com
- **Payment:** Email remittance to accountsreceivable@transitionsrbg.com
- **Support:** Contact the email above and CC your Account Manager

***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

