

For employers and HR teams

Employer benefits planning

Bring your priorities and questions to a benefits conversation.

Use this worksheet to organize a conversation with Bloom. Keep employee names, medical information and account details off this sheet.

1

Which states does your team work in, and about how many employees do you have?

2

Which benefits do you offer today, and when do they renew?

3

Which benefits would you like to explore: health, life, dental, vision, disability, accident or wellness?

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4 What budget range and employee contribution approach would you like to discuss?

5 What questions or access problems are employees bringing to you?

6 Who will coordinate benefits decisions and employee communications?

A planning worksheet is not an application, quote or commitment to coverage. Availability and terms depend on the employer, state and applicable plan.