



Main Dashboard

Manage Plans

Invoices

Payables

Settings

Marketing & Promotions

Manage System Users

Manage Individual Clients

Manage Corporate Clients

→ Logout Select Language ✓

Welcome Admin

Actions Required

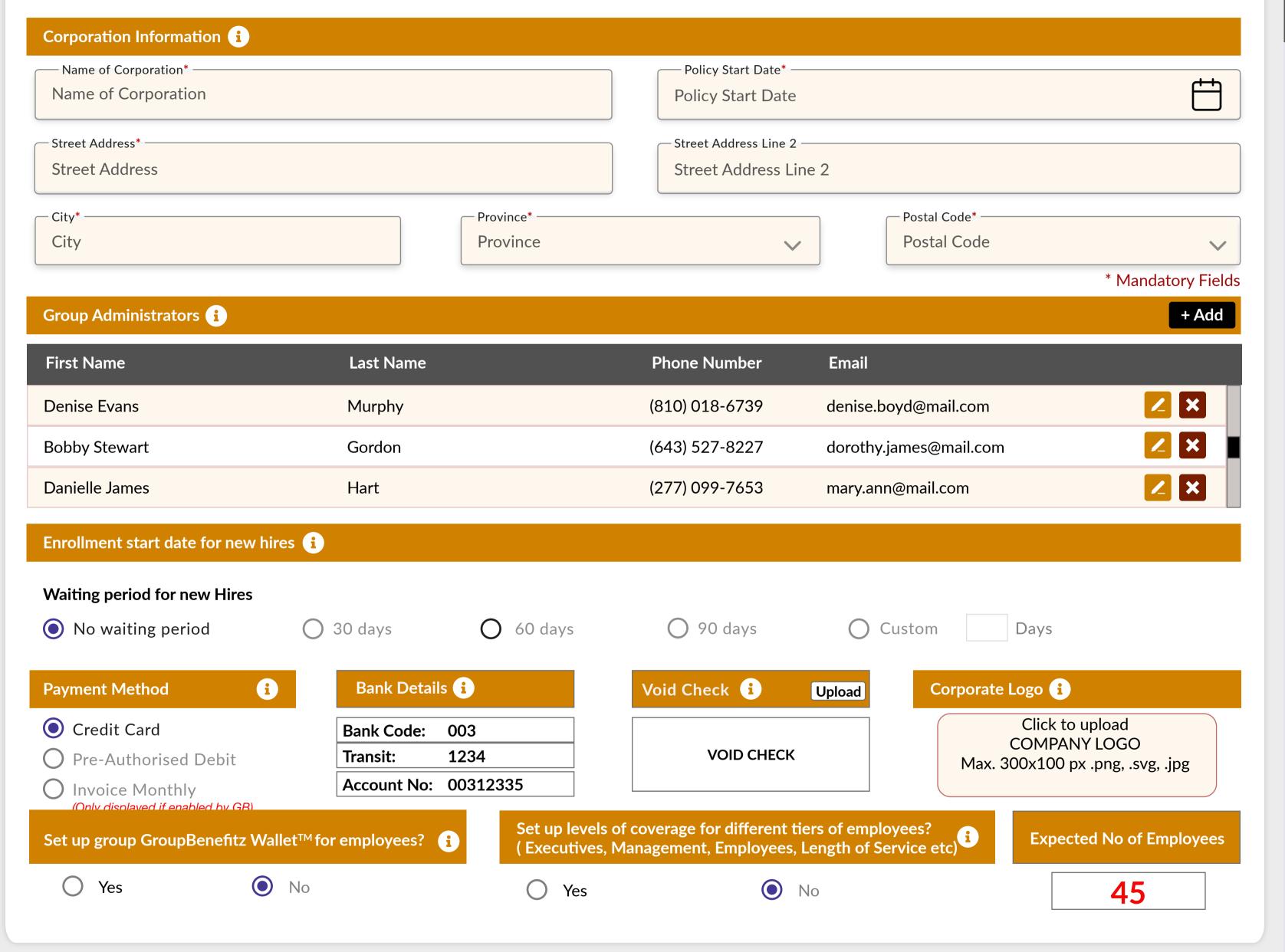
Action 1

Action 1

Action 2

Messsage





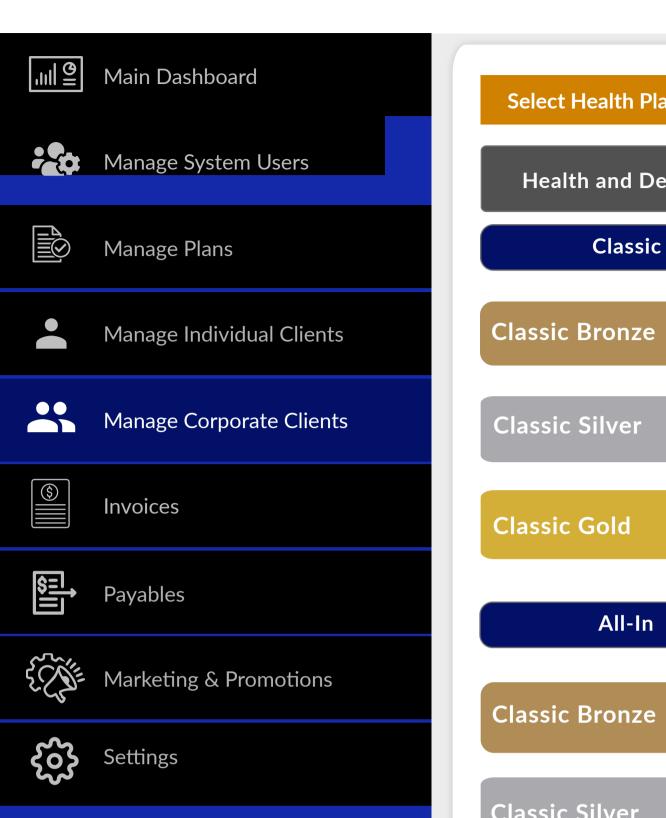
Save & Next —



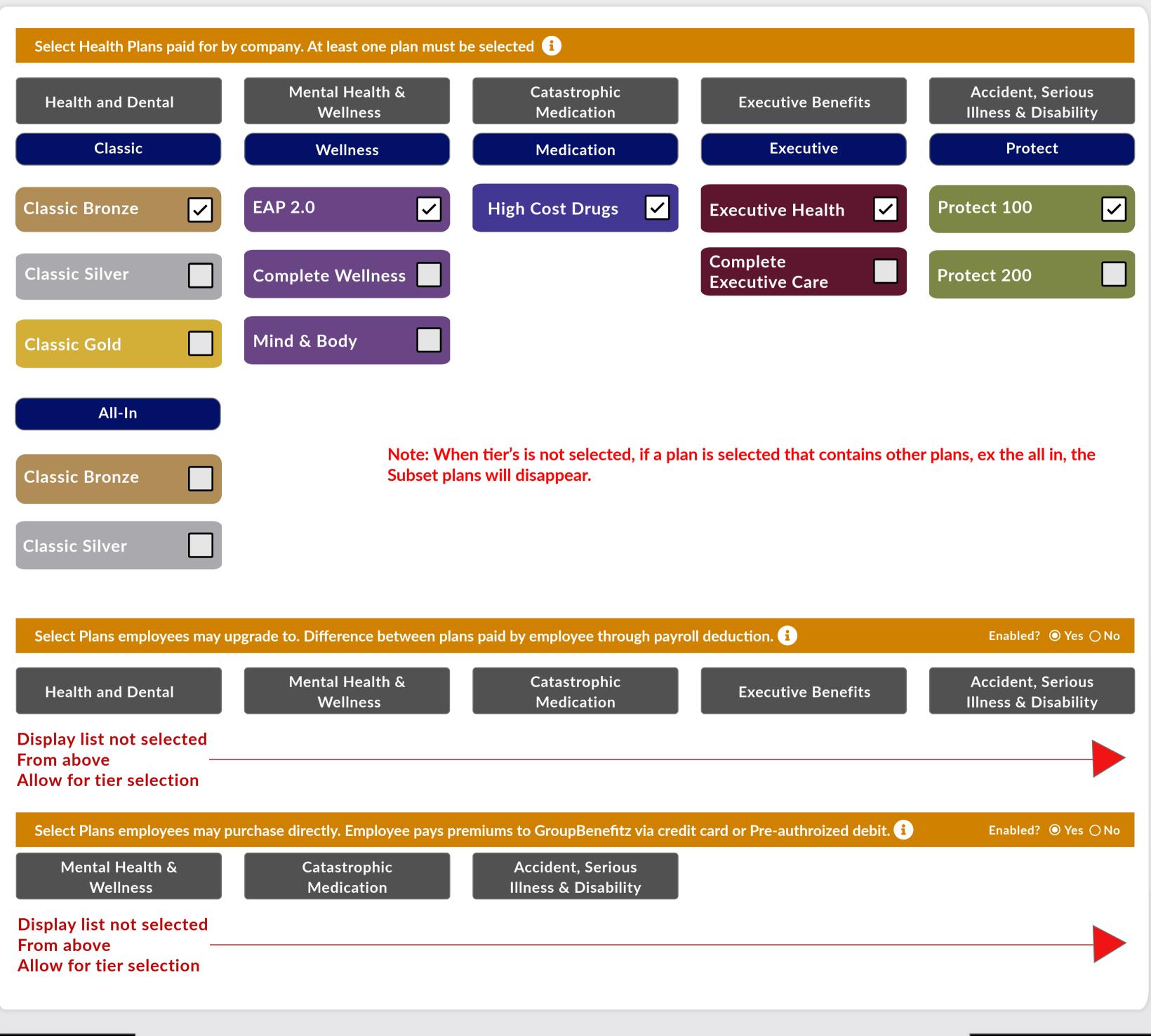
Edit is only visible when a client is found in the search bar

Save & Next —





Previous





CORPORATE Client Name

{Corporate Client} opted for a Group Benefits Wallet™?

No

GroupBenefitz Wallet™ (1)

Corporate Client ID: ######

Account Status: Draft/Pending Admin/Active

□ Logout Select Language 🗸

Main Dashboard



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Marketing & Promotions



Multi-Tiered Health Benefits Options: 1

{Corporate Client} has opted for Tiered Health Benefits?

No

Welcome Admin **Actions Required** Action 1



Messsage

← Previous

Save & Next -



Projected monthly premium range \$ #### to \$

Account Status: Draft/Pending Admin/Active

Select Language 🗸	Г → Logout
Sciect Language V	

Welcome Admin

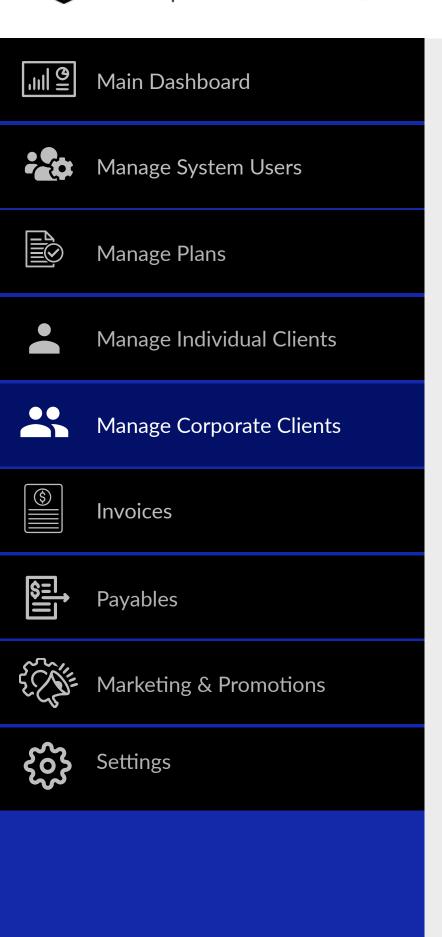
Actions Required

Action 1

Action 1

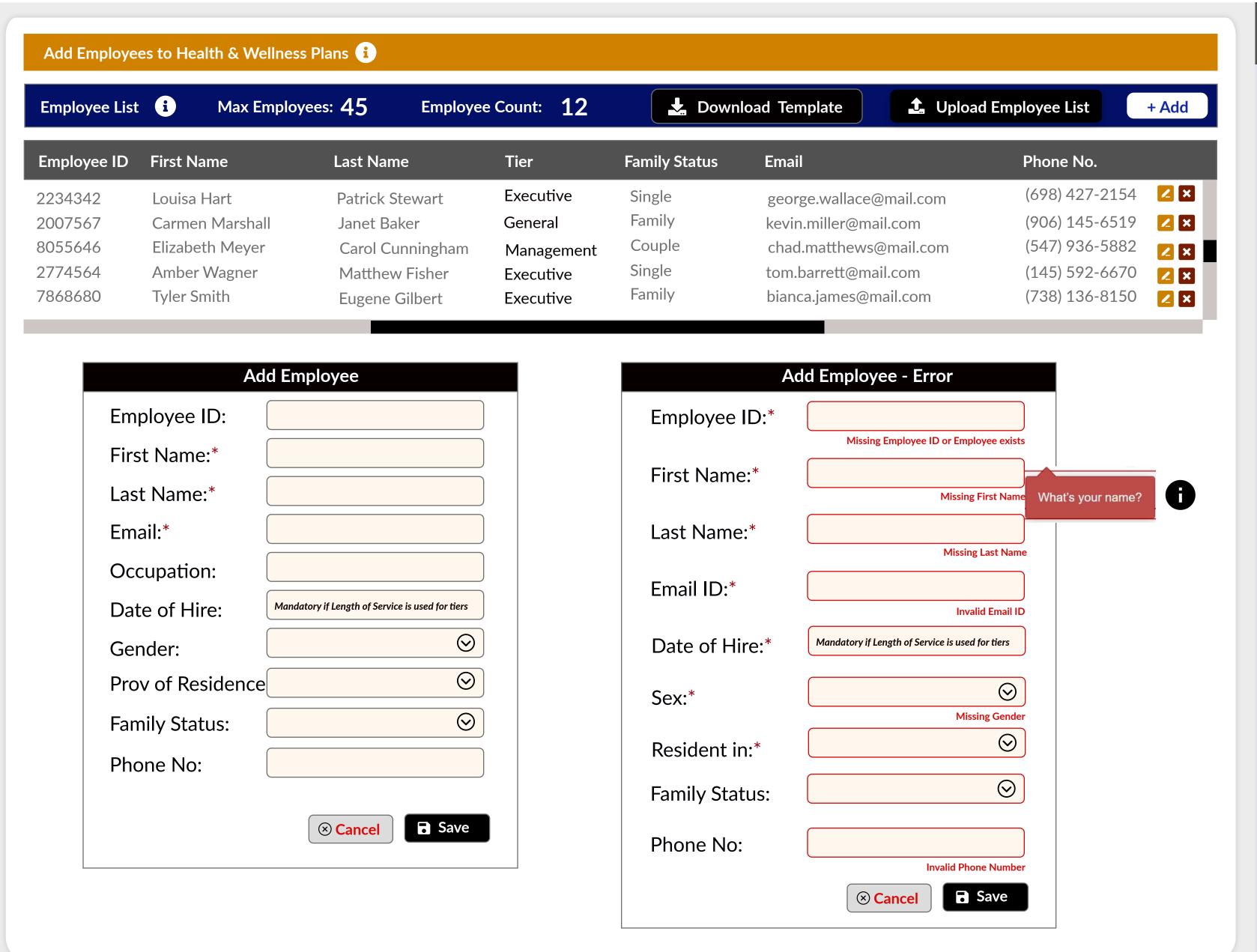
Action 2

Messsage



Advisors select one or more \vee

Previous



Corporate Client ID: ######

Save & Next -

CORPORATE Client Name

Projected monthly premium range \$ #### to \$ #####

Account Status: Draft/Pending Admin/Active



Welcome Admin

Actions Required

Action 1

Action 1

Action 2

Messsage

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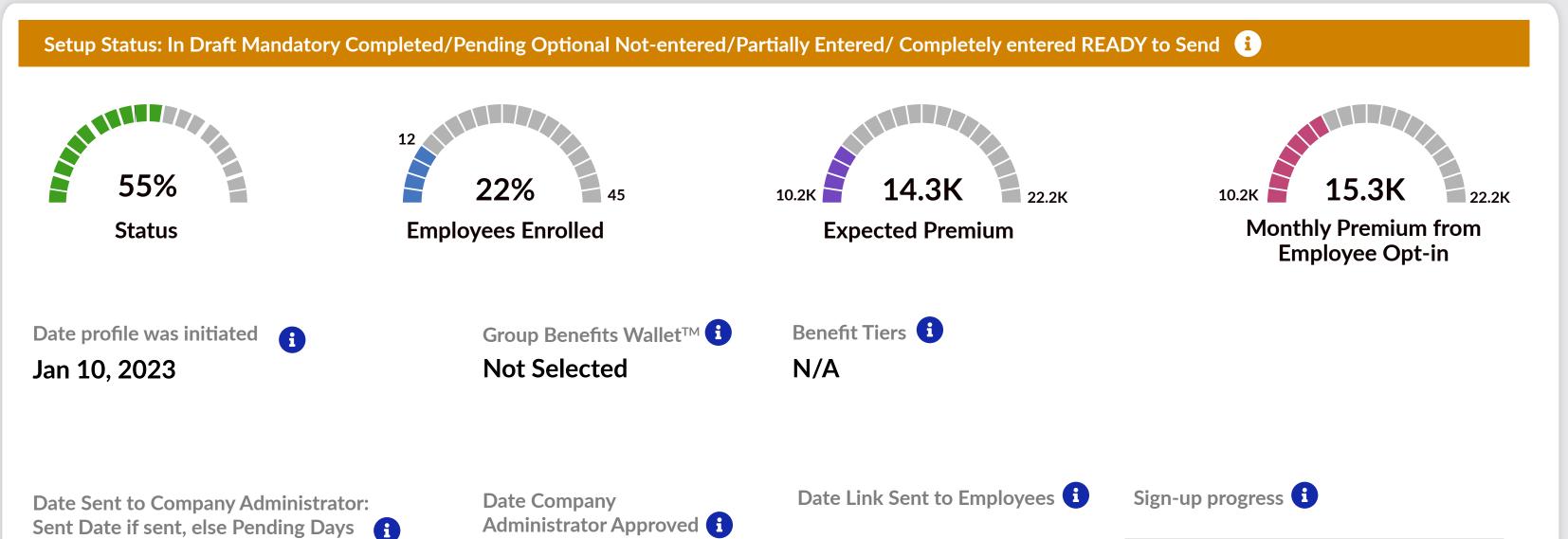
Manage Corporate Clients

⑤ Invoices

Payables

Marketing & Promotions

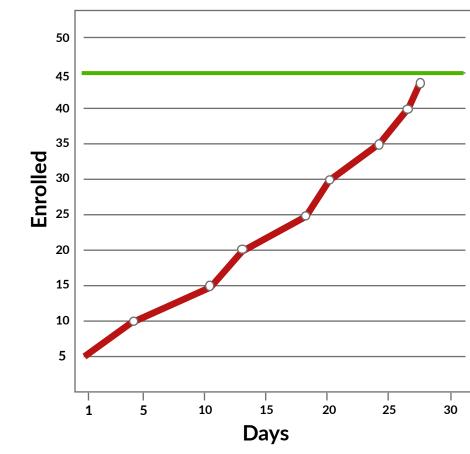
Settings



Jan 16, 2023

Corporate Client ID: ######

Jan 16, 2023



Send to Company Administrator

← Previous

Since Profile was Created

Jan 10, 2023

DONE