PROFILE

B

HEALTHAXIS GROUP LLC

5509 W GRAY ST STE 200

TAMPA

FL 33609

455531595



+1 (888) 974-2947



http://healthaxis.com

MSID EIN

M84000553275798



http://www.facebook.com/healthaxisteam



http://www.linkedin.com/company/healthaxis

https://twitter.com/healthaxis

NAICS codes

518210 - Data Processing, Hosting, and Related Services

541511 - Custom Computer Programming Services

541512 - Computer Systems Design Services

621999 - All Other Miscellaneous Ambulatory Health Care Services

524113 - Direct Life Insurance Carriers

541519 - Other Computer Related Services

541618 - Other Management Consulting Services

541513 - Computer Facilities Management Services

541611 - Administrative Management and General Management

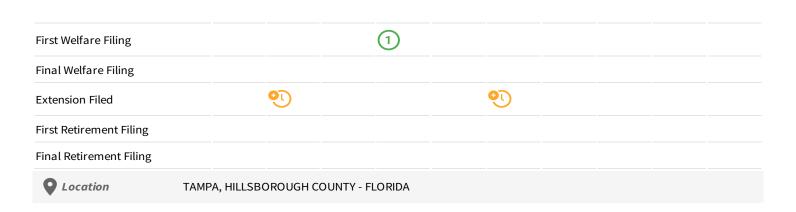
Consulting Services

623110 - Nursing Care Facilities (Skilled Nursing Facilities)

and 6 others

HealthAxis Group strives to move the practice and delivery of healthcare towards the ideal.

200) - 499 employees				\$	50M - 10	00M revenu	е			
		2024	2023		2022	2021	202	20	2019	2018	2
ligible E	mployees	340	215		185	142	22	27	173	150	
e Kej	/ Influencers			ND MCLEN	N AGENCY L NAN AGENC				N COMPAN N COMPAN		
	MARSH & MCLENNA MARSH AND MCLEN Benefits Broker					LC	OCKTON CC OCKTON CC Broker		LLC		
	UBS FINANCIAL SER Retirement Advisor/C					AS Acc	SSURANCE counting Fire		IS		
€ Key	/ Indicators	M									
KPI's		2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega Wr	ар	M	M	M	M	M	M	M	M		
Collective	ely Bargained										
Self-fund	led Employee Benefits						\$	\$			
iling wit	h no Schedule A										
Multiple I	Employer (Welfare)										
Multiple I	Employer (Retirement))									
Filing Sta	itus	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Deliquen	t Filing										

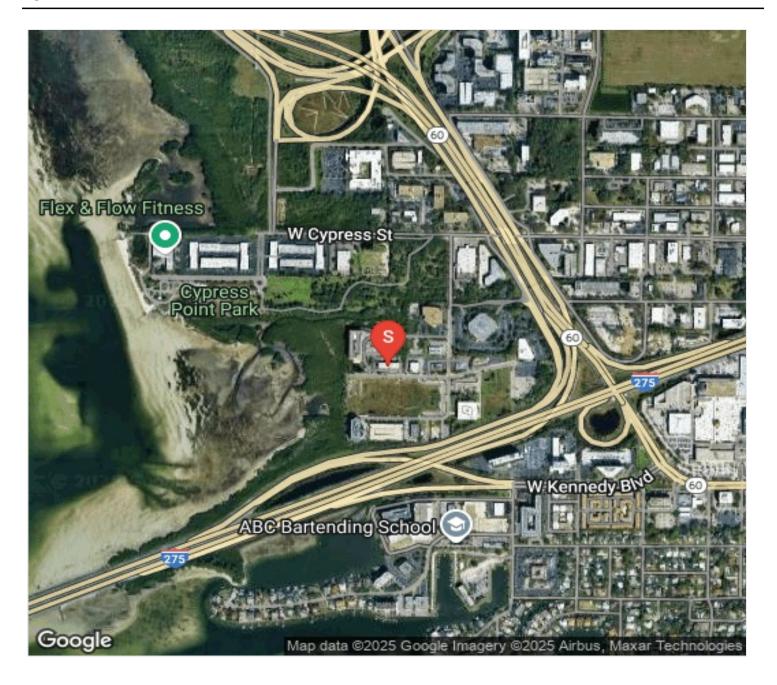


Top 5 Carriers for Hillsborough County - Florida

Rank	Carrier	Premium
1	FLORIDA BLUE CROSS BLUE SHIELD	\$276,375,263
2	AETNA	\$156,429,918
3	CIGNA	\$136,421,922
4	UNITED HEALTHCARE	\$120,256,423
5	MET LIFE	\$86,258,484

Top 5 Brokers for Hillsborough County - Florida

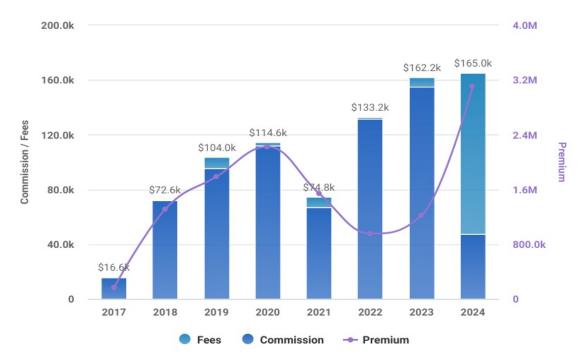
Rank	Broker	Commission	Fees
1	COADVANTAGE INSURANCE SERVICES	\$3,655,236	\$827,946
2	MERCER HEALTH AND BENEFITS	\$2,843,699	\$460,789
3	BALDWIN GROUP	\$2,855,341	\$431,149
4	LOCKTON COMPANIES	\$1,970,087	\$474,680
5	MARSH AND MCLENNAN AGENCY	\$1,603,635	\$450,459



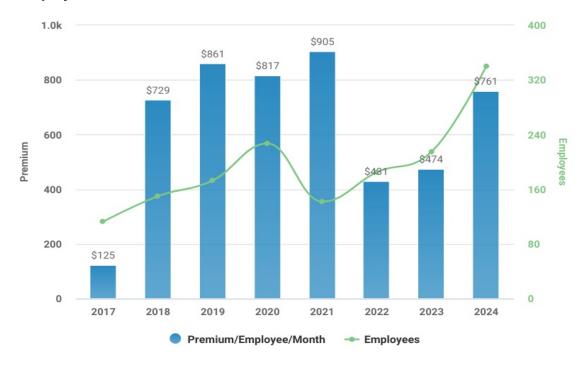
INSIGHTS

BENEFITS

Premium, Commission and Fees



Premium per Employee



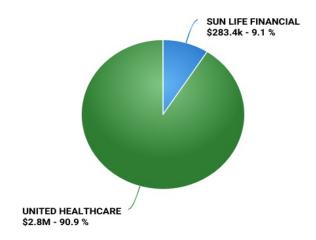
Broker History



Current/Future Retirees

	2024	2023	2022	2021	2020	2019	2018	2017
Current Retirees	0	0	0	0	0	0	0	0
Future Retirees	0	0	0	0	0	0	0	0

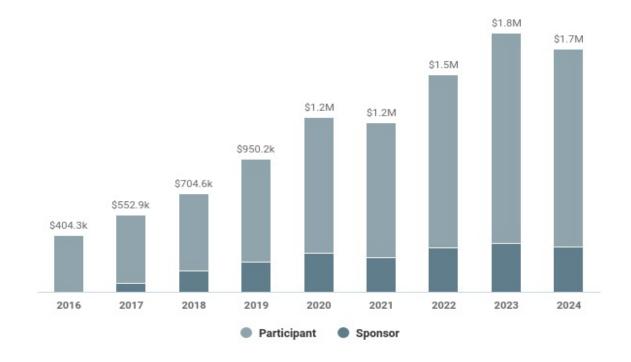
Spend By Carrier



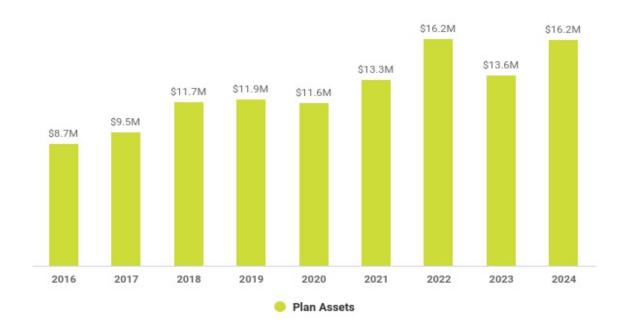
Name	Plan Types	Premium
UNITED HEALTHCARE	Health	\$2,823,363
SUN LIFE FINANCIAL	Vision Life ST Disability LT Disability	\$283.391

RETIREMENT

Contributions



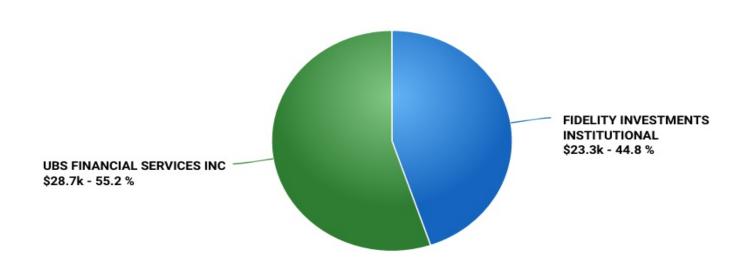
Plan Assets



Fidelity Bond

	Renewal	Beginning Assets	Ending Assets	Bond Amount	Ratio
★ HEALTHAXIS GROUP, LLC 401(K) PLAN	01/01/2024	\$13,594,498	\$16,164,445	\$500,000	3.68%

Spend by Retirement Service Provider



Service Provider Name	Service Types	Total Compensation
UBS FINANCIAL SERVICES	Advisers - Investment Advisory (Plan)	\$28,708

FIDELITY INVESTMENTS INSTITUTIONAL

 $Service\ Providers\ -\ Participant\ Loan\ Processing, sub-transfer\ agency\ fees, record keeping\ fees, account\ maintenance\ fees$

\$23,300

PLANS AND SERVICES

Benefits Plans

BENE	FITS PLANS(2)	\$3.1M Premium \$165.0k Revenue	\$47.3k Commission	n \$117.7k Fees
Health				HEALTHAXIS GROU Renewal: 01/01/202
Carrior				, ,
	IEALTHCARE INSURANCE COMPANY HEALTHCARE	Premium \$2.8M	Participants 463	Premium/Participant/Month \$508
		Revenue \$130.0k 4.60%	Commission \$18.2k 0.64% (2.58%)	Fees \$111.8k 3.96%
FL)	MCLENNAN AGENCY LLC (MAITLAND, ND MCLENNAN AGENCY	Revenue \$99.9k 3.54%	Commission \$15.3k 0.54%	Fees \$84.7k 3.00%
	N COMPANIES LLC (KANSAS CITY, MO) N COMPANIES	Revenue \$19.4k 0.69%	Commission \$2.9k 0.10%	Fees \$16.5k 0.58%
(CLEARW	: MCLENNAN AGENCY LLC 'ATER, FL) .ND MCLENNAN AGENCY	Revenue \$10.6k 0.38%	Commission \$0 0.00%	Fees \$10.6k 0.38%
	Eife Temporary Disability	0 0	oility 00	HEALTHAXIS GRO Renewal: 01/01/20
Voluntary (All	Critical Illness/Cancer	Other		
	ASSURANCE COMPANY OF CANADA FINANCIAL	Premium \$283.4k	Participants 340	Premium/Participant/Month \$69
		Revenue \$35.0k 12.34%	Commission \$29.1k 10.26% (9.97%)	Fees \$5.9k 2.08%
(CONSH	MCLENNAN AGENCY LLC DHOCKEN, PA) ND MCLENNAN AGENCY	Revenue \$28.7k 10.12%	Commission \$22.8k 8.04%	Fees \$5.9k 2.08%
	N COMPANIES LLC (KANSAS CITY, MO) N COMPANIES	Revenue \$6.3k 2.22%	Commission \$6.3k 2.22%	Fees \$0 0.00%
etails				
Contract # line of Busines	957185 Ss Vision,Life Insurance,Temp	orary disability Long-ter	m disability.AD&D. ACCIDE	NT. Cl. HI

Retirement Plans



Ending	\$16,164,445 \$500,000(3.68%)	16
Average participant balance	\$40,011	
Plan Descriptions		
2E Profit-sharing	2F ERISA section 404(c) Plan	
2G Total participant-directed Plan	2J Code section 401(k) feature	
2K Stock bonusCode section 401(m)	2S Provides for automatic enrollment	
2T Default investment account	3D Pre-approved pension plan	
Advisors	Service Providers	
UBS FINANCIAL SERVICES INC	\$28,708 FIDELITY INVESTMENTS INSTITUTIONAL	\$23,300
Other Plan Details		
Participant Loans	\$123,195 Retirees Current/Future	2/181

Benefits Services



BENEFITS SERVICES

This company has not reported any Benefits Services

Retirement Services

00	RETIREMENT SERV	/ICES(2)	\$52.0k Direct Compensatio	SO Inc	lirect Compensation
00	UBS FINANCIAL SE Retirement - Adviso		\$28.7k Total	Compensation	HEALTHAXIS GROUP, LLC HEALTHAXIS GROUP, LLC 401(K) PLAN
EIN		132638166		Direct Compensatio	n \$28,708
Service	Description	Investment Advisory	(Plan)	Indirect Compensat	ion \$0
				Total Compensation	\$28,708
00	FIDELITY INVESTM Retirement - Service	ENTS INSTITUTIONAL ce Providers	\$23.3k Total	Compensation	HEALTHAXIS GROUP, LLC HEALTHAXIS GROUP, LLC 401(K) PLAN
EIN		042647786		Direct Compensatio	n \$23,300
Service	Description	Particpant Loan Pro transfer agency fees,recordkeeping f maintenance fees	O,	Indirect Compensat	ion \$0
				Total Compensation	n \$23,300

INFLUENCERS



Benefits Brokers

MARSH AND MCLENNAN AGENCY	84.43%	\$139,276
MARSH & MCLENNAN AGENCY LLC MARSH AND MCLENNAN AGENCY	485 N KELLER RD MAITLAND, FL	\$99,947
MARSH & MCLENNAN AGENCY LLC MARSH AND MCLENNAN AGENCY	PO BOX 350 CONSHOHOCKEN, PA	\$28,693
MARSH & MCLENNAN AGENCY LLC MARSH AND MCLENNAN AGENCY	101 N STARCREST DR CLEARWATER, FL	\$10,636
LOCKTON COMPANIES	15.57%	\$25,686
LOCKTON COMPANIES LLC LOCKTON COMPANIES	444 W 47TH ST STE 900 KANSAS CITY, MO	\$25,686

Total for HEALTHAXIS GROUP LLC - 2024 Benefits Broker Commission and Fees

\$164,962



CL Brokers

LOCKTON COMPANIES

Latest Policy Date: 01/29/2024 KANSAS CITY LOCKTON COMPANIES LLC



Retirement Service Providers

In-Force revenue of \$28,708 UBS FINANCIAL SERVICES INC

Advisers

In-Force revenue of \$23,300 FIDELITY INVESTMENTS INSTITUTIONAL

Service Providers



Accounting Firms

ASSURANCE DIMENSIONS

ASSURANCE DIMENSIONS

CONTACTS

Angela Benmassaoud Chief People Officer Form 5500 Signatory	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 angela.benmassaoud@healthaxis.com
Heather Peterspm Form 5500 Signatory	HEALTHAXIS GROUP, LLC TAMPA - FL	
Shilen Patel CEO	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Tim Reinauer Chief Financial Officer	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 tim.reinauer@healthaxis.com
Peter Murphy Coo	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 peter.murphy@healthaxis.com
Neal Reizer Cto	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 neal.reizer@healthaxis.com
Zachary Kilburn Chief Technology Officer/Chief Information Officer	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 zkilburn@healthaxis.com
Chris House Cto	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 <u>chris.house@healthaxis.com</u>
Jason Patchen President	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Eric Strikowski Chief Innovation Officer	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 estrikowski@healthaxis.com
Larry Thompson Executive Vp	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 lthompson@healthaxis.com
Greg Von Der Lippe Chief Growth Officer	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Sanghamitra Rini Das Hr Business Partner	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Nicole Harra Senior People Success Partner	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 nicole.harra@healthaxis.com
Carmen Alverio Strategic People Partner	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 calverio@healthaxis.com
Tina Shafer Controller	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 tina.shafer@healthaxis.com
Dennis Hennessey Vp Customer Success Enablement	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Rebecca Pessel Vp People	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Roxanne Seale Sr Vp	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Sierra Leone Collins Zendesk Administrator	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947
Shelli Burke Accounting Manager	HEALTH AXIS GROUP TAMPA - FL	(888) 974-2947 sburke@healthaxis.com

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James Goodman	HEALTH AXIS GROUP	(888) 974-2947
Financial Planning Analysis Manager	TAMPA - FL	jgoodman@healthaxis.com
DL onna Adams	HEALTH AXIS GROUP	(888) 974-2947
Director Of Operations	TAMPA - FL	dadams@healthaxis.com