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CBWealthandInsurance.com

NEFA Member Benefit Resource: Health and 401(k)

What to Expect from Our Team

High-quality support for you, your employees and plan participants.

- Annual or semiannual participant education/enrollment sharply focused on helping participants achieve retirement readiness.
- Competitive rates designed to help you save more on your bottom line.

Health*

Improve the effectiveness of medical plans for your employees.

- Potential cost savings through association preferred carriers.
- A look into level funded plans that offer a possible return of premium with no extra liability.
- Online benefit admin tool that creates simplicity for your employees.

401(k)

Improve the strength of your retirement plan.

- Easier administration and management of your retirement plan.
- Plan design features that can help encourage higher participation levels and deferral rates.
- Consider bringing your plan to market every three years to explore competitive rates.



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*Offering health benefit products is an outside endeavor Cannaday Bloom Wealth and Insurance Solutions is involved with separate and distinct from their role as financial professionals with Principal Financial Group. These activities, products and services are not sponsored, endorsed by or affiliated with any company of the Principal Financial Group®.

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