

# The Successful Partnership Between Bolton Health & RetireeFirst in Enhancing Retiree Healthcare



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Preserving Retiree Healthcare. *Ensuring Peace of Mind.*

**Bolton**

# Challenge

For consultants like Mark Lynne from Bolton Health, finding a partner who comprehends the nuances of Medicare and group retiree benefits, while also respecting their expertise and involving them in the analysis and problem-solving process, can be a challenge.

## Bolton

Mark Lynne has been **at the forefront of collaborating with Labor Trustees and Public Sector clients for nine years.**

Mark represents a number of both multiemployer and public sector clients in the Mid-Atlantic area.



## Enhancing Benefits for Retirees

# Solution

RetireeFirst worked with Mark to help two clients who were looking to provide their retirees with cost-efficient healthcare without impacting the fund or service provided. By offering flexible working models and a non-competitive approach, RetireeFirst has become a trusted partner in delivering a niche expertise and unmatched advocacy to clients.

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“What RetireeFirst is doing is helping clients find a solution that is going to work for everybody. The consultant is going to look good for finding RetireeFirst, the plan sponsor is happy with the financials, and the retiree is taken care of by a compassionate team of Advocates.”



**Mark Lynne**  
Principal and Vice President  
Bolton Health

## Enhancing Benefits for Retirees

# Solution

Mark started partnering with RetireeFirst in 2014 with a critical case involving **a local union in Maryland**. The union's goal was to offer their retirees cost-effective healthcare without impacting the main medical fund. The labor trustees overseeing the fund were quite skeptical about the move, noting that their retirees had various and significant needs and were used to a plan that had been in place for years.

**They worked together to design and seamlessly transition over 500 retirees and their dependents to a robust Medicare Supplement and EGWP Part D plan.**

The client has commented many times since how smooth the transition was with RetireeFirst's excellent service model. Over the years and throughout successive renewals, the Fund has remained steadfast in its commitment to optimizing members' healthcare investments and ensuring top-tier benefits.

**3** CASE STUDY | Broker & Consultant Partnerships

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“I have called [RetireeFirst] on several occasions in the two years I have been a member. My problems have always been dealt with in a straightforward and extremely efficient manner. Your organization is a godsend.”

Retiree from Maryland union

**RetireeFirst**

## Enhancing Benefits for Retirees

# Solution

In 2018, RetireeFirst and Mark teamed up again, this time to assist a public sector client. Leveraging RetireeFirst's expertise, the consortium's retirees smoothly transitioned from a self-funded product to a Medicare Supplement with Part D (EGWP) and recently moved to an MAPD plan for even greater savings.

**Initial savings from the first transition was in excess of \$2.5 million. Savings for 2023 with the move to MA was just shy of \$1 million. As with the Maryland union, the transition was seamless.**

## A World-Class Service Model Built on Retiree Healthcare Advocacy

Mark emphasizes the value of RetireeFirst's service model, stating, "RetireeFirst truly stands out with their exceptional service model, ensuring retirees receive the best service, and that's what our clients care about." Retirees receive personalized support through every phase of their journey. It means a dedicated phone line and a live human on the other end of it—including someone who understands their unique needs. All member cases are assigned a lead Advocate as first point of contact to develop a 1-1 relationship with the member and take full responsibility for end-to-end issue resolution and follow-up calls.

## RetireeFirst Partnership :

# Benefits

Working with RetireeFirst has been instrumental for Mark in client retention. Mark can offer his clients a wider range of expertise, resulting in higher client satisfaction and loyalty. By harnessing their extensive book of business, RetireeFirst consistently keeps rates competitive. The financials remain robust while ensuring excellent benefits for the members.

Mark praises RetireeFirst's proactive approach, regularly keeping a pulse on the latest market offerings and seamlessly implementing plans. This successful collaboration demonstrates the power of a strong partnership between RetireeFirst and firms like Bolton.

Collaboration that Enhances Benefits for Both Partners & Clients



**Client Retention:** Offering a wider range of expertise results in higher client satisfaction and loyalty



**Robust Financials:** RetireeFirst consistently keeps rates competitive and drives low single-digit trends



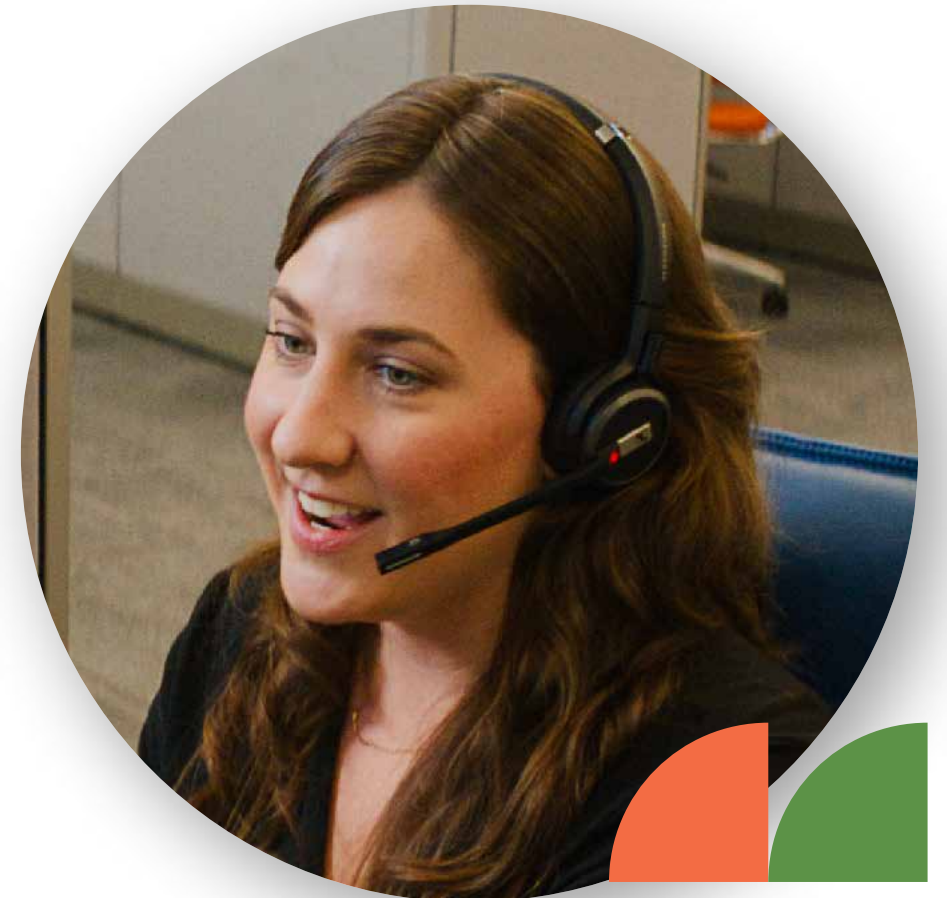
**Excellent Service & Seamless Implementation:** Our advocacy service model ensures retiree members receive *the best care*



# Contact

Experience the transformative outcomes of our collaborative approach—contact us today to learn how partnering with RetireeFirst can help you differentiate, retain clients, and drive business growth.

To learn more, contact [sales@RetireeFirst.com](mailto:sales@RetireeFirst.com)



RetireeFirst

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*Ensuring Peace of Mind.*