



# RetireeFirst

## Company Overview

RetireeFirst is the leader in Retiree Benefits Management. We specialize in simplifying the Medicare landscape to preserve and enhance group retiree benefits while delivering a stress-free experience. By saving costs and time while improving outcomes, we ultimately drive significant value for plan sponsors and their retirees, carriers, and brokers and consultants. Our unparalleled Retiree Advocacy Services are our true hallmark. RetireeFirst Advocates care about helping members navigate Medicare, understand their benefits, and connect to programs that can improve their health and wellbeing.

We create a positive experience for all our stakeholders, and it starts with people.

## A Clear Path to Unrivaled Outcomes

With our end-to-end Retiree Benefits Management solution, combined with our people-centric approach and deep carrier relationships, we're the only partner that can dramatically reduce costs and increase member satisfaction at the same time.



**20–50%**

**Immediate bottom-line savings** for groups moving to Medicare Advantage for the first time.



**90+**

**Net Promoter Score (NPS)**  
Over 90% of our clients recommend RetireeFirst.



**99.9%**

**Client Retention Rate**  
Our clients serve as references, a testament to their satisfaction.



## Who We Serve

RetireeFirst serves 375+ groups and over 325,000 Medical and Pharmacy lives across all 50 states. Our clients are hundreds of labor unions, public sector entities, higher education, and commercial organizations.

## Our Partnerships

We partner with all major national health carriers, and brokers and consultants, to drive value and improve outcomes for plan sponsors and their retirees.

## Awards and Accreditations



Awarded a full URAC Core Accreditation for our commitment to upholding federal regulatory requirements and improving business processes



Recognized in 2020, 2022, and 2023 as one of *Philadelphia Business Journal's* "Best Places to Work," voted on by employees



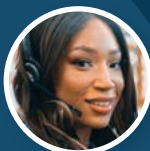
Won a Bronze Globee American Business Award for Best Benefits Management Solution in June 2023, recognizing teams whose approach and platform improve benefits around healthcare and wellbeing



## About RetireeFirst



We are the premier Retiree Benefit Management provider, enhancing the experience and outcomes for group plan sponsors and their retirees. We provide an end-to-end solution built on three pillars: Strategy, Support, and Advocacy, and partner with brokers, consultants, and clients to meet their unique needs—ultimately reducing costs while preserving group retiree benefits.



To learn more, visit our website [RetireeFirst.com](https://www.RetireeFirst.com)

# RetireeFirst



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