

# Retiree Advocacy Services

# RetireeFirst

## We Are Caregivers

Navigating retiree healthcare benefits is complex. Let us be your guide. Our Advocates are dependable, compassionate, and focused on creating meaningful, lasting impacts on members' lives.



## Members receive personalized service through every phase of their journey.

Creating a positive experience through retiree healthcare advocacy is our priority—and it starts with people. Our unparalleled Retiree Advocacy Services are at the heart of everything we do. **We work every day to create a seamless benefits experience and deliver on the promise of improving the health and happiness of the people we serve.**

**Members talk to a live person based in the U.S.—no chatbots**—who helps proactively resolve any healthcare benefits challenge they may face. Whether it's making calls to insurance carriers, pharmacies, or providers' offices on behalf of members, RetireeFirst Advocates truly care about helping retirees navigate Medicare and improve their health and wellbeing, resulting in happier and more engaged members.

Our Advocates are measured on call quality—not time to completion or daily call quota. They spend as much time as necessary to answer members' questions, achieve successful resolution of issues, and educate members on wellness programs to promote engagement and reduce care gaps. Each member has a dedicated Advocate with whom he/she can speak at any time—**this builds trust, personal friendships, and ensures members' peace of mind.**



# RetireeFirst: Going Above and Beyond for Retirees

Everyone can relate to the challenges of using health insurance. We all have family members or friends who have struggled to understand their benefits. RetireeFirst is dedicated to going above and beyond for our clients and members, ensuring that no call or question goes unanswered, and no challenge goes unmet. Our mission is personal, driven by a commitment to provide exceptional advocacy and service.

## Resolving Member Issues: The Story of Eleanor

Eleanor's story is a shining example of how RetireeFirst Advocates go to amazing lengths for our members. Eleanor, a valued member of Teamsters 282, relied on weekly medical appointments to manage her condition. However, her lack of transportation options became a significant hurdle as she didn't own a car and had no local assistance. When Eleanor sought help from her dedicated Advocate, Brooke, our team sprang into action. Brooke diligently explored various options, ultimately finding a reasonably-priced solution with a rideshare app. She went the extra mile by providing step-by-step guidance on using the app, ensuring Eleanor's access to vital appointments and peace of mind.

### Personalized Advocacy Service



For over two years, Eleanor and Brooke have developed a trusting friendship as Brooke resolved multiple issues on Eleanor's behalf. Retirees face numerous benefits-related challenges during retirement and seek **human-centric service and compassionate care**.



Through our service, **members with open cases are connected with their dedicated Advocate**. If the primary Advocate is unavailable, another team member steps in to offer assistance or take a message. This personalized approach ensures continuity and fosters strong connections with our members.



Delivering exceptional service has resulted in a **90+ Net Promoter Score (NPS) and a 100% client retention rate, surpassing industry benchmarks**. These outstanding outcomes reflect our people-first approach and tangible results.



## 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)



### How can we help?



856.780.6218



[info@RetireeFirst.com](mailto:info@RetireeFirst.com)



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