

2022-2023

SAMPLES

Employee Benefit Statements

Communicate the value of your total compensation package



Introduction

Many employees are unaware of the full scope of their compensation package, which can result in high turnover, increased competition, lack of culture and community, and lack of morale.

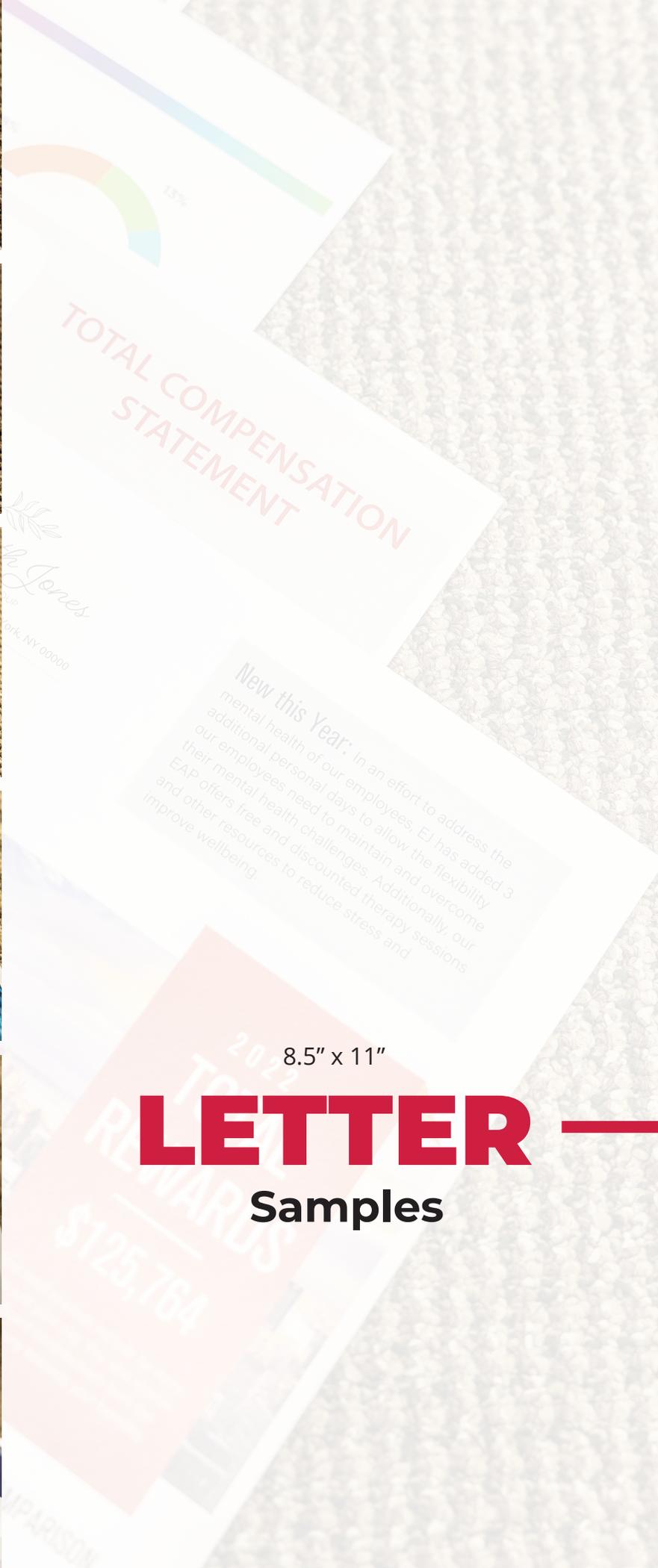
We want to help your employees understand the full value of the pay and benefits that your company offers. A customized employee compensation statement provides detailed personalization for every individual that helps them visualize and quantify the benefits the company provides in a clear, eye-catching presentation.

With full customization to fit your company brand and message, you can easily create a statement that delivers effective communication to your employees.

Features:

- Work with a dedicated project manager who will guide you through developing your custom statement, review your data, and provide expertise throughout the process.
- Start from one of our included templates, or mix-and-match elements to create a one-of-a-kind look that communicates your brand message.
- Create a visual representation of the pay and benefits that your company offers, with targeted messages based on specific data points or employee segments.
- Educate and inform during recruitment and open enrollment, as well as increase participation.





8.5" x 11"

LETTER

Samples

Estate Escape 2022-2023



Based on one of our most popular layouts, Estate Escape is a refreshed take on our previous Alpine Synergy sample.

The front of the statement features a large area for your message from leadership and lots of flexibility for other elements such as bold images and charts.

On the back, the benefits table is color-categorized to make identification easy. The benefit breakdown table shows the distribution of company-paid benefits in a variety of categories, with brief descriptions below.

With lots of flexibility, this statement is easily converted to fit your company branding and compensation package in a way that clearly shows employees the value of their benefits.

Features:

- Total Compensation bar chart
- Benefit Breakdown pie chart
- Color-categorized benefits table
- Benefit descriptions
- Shows both company & employee contributions to benefits

Medical Center 2022-2023



This year, our Medical Center sample got a facelift! The new and improved layout packs a punch with bold graphics and lots of room for benefit descriptions and company photos.

Emphasize the value of both benefits and pay with the stacked bar chart on the front, along with a large area for your leadership letter.

Charts are also the main feature on the back of the statement, starting with a Compensation Comparison pie chart illustrating pay, PTO, and benefits. Below, a large itemized benefits table allows you to list out every benefit an employee is receiving. Another great feature is the retirement chart, which can help employees understand the value of saving for their future and how your company contributes to their retirement.

Features:

- Stacked Total Compensation bar chart
- Compensation Comparison pie chart
- Itemized benefits table
- Benefit descriptions
- Maximize Your Retirement chart
- Shows both company & employee contributions to benefits

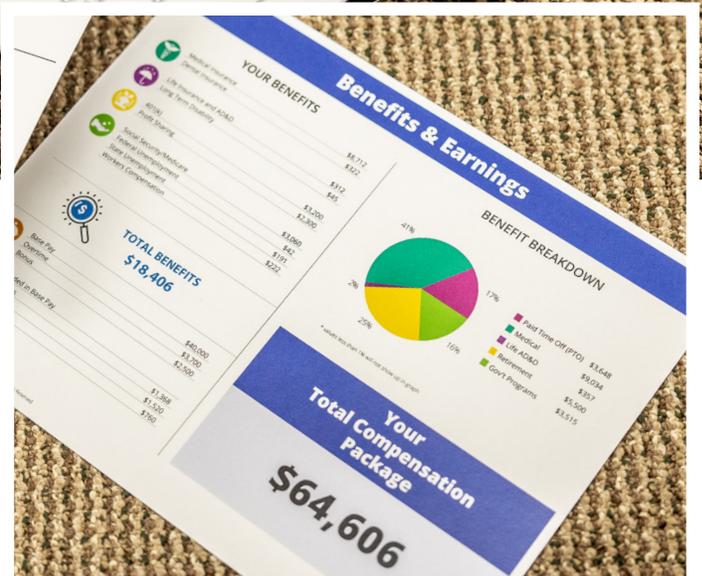
Dr. Barkley's 2022-2023



Did you know that you can add interactivity to your physical samples? By utilizing technology such as augmented reality and QR codes, your statement can link to additional documentation, informational videos, and more.

Our Dr. Barkley's sample features an AR video message through the ROAR app when the company logo is scanned by a phone camera.

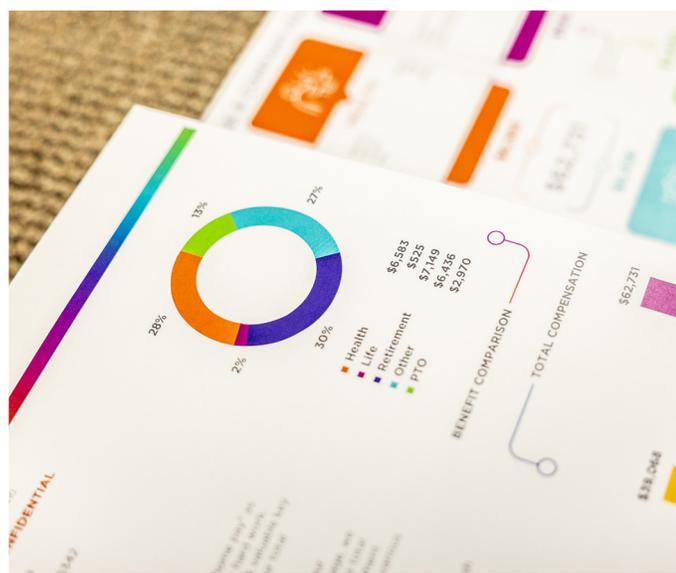
This statement also utilizes bright colors and icons to color code and categorize your benefits for ease of comprehension. Each category (health, life, retirement, PTO, taxes, and earnings) is given its own color and icon to help employees see exactly what type of benefits they're receiving. On the back, a benefit breakdown chart also utilizes these colors to visualize the distribution of benefits.



Features:

- Total Compensation side-by-side bar chart
- Benefit Breakdown pie chart
- Color-categorized benefits table with icons
- Shows only company contributions to benefits
- Interactive features via ROAR
- Emphasis on total compensation package

Creative Tech 2022-2023



Bright and colorful categories are the main feature of this statement! With big icons and bold colors, it's easy to see exactly what benefits an employee is receiving and where the value is.

The front of the statement keeps it simple with a letter from leadership and two charts showing the distribution of benefits and total compensation categories.

Six categories are available on the back to show the various benefits - either as a short description or as individual line items. In the center of the page, the compensation is shown as a total of all 6 categories.

Features:

- Total Compensation bar chart
- Benefit Comparison pie chart
- Categorized benefits with optional descriptions or line items in each category
- Shows only company contributions to benefits

Homebuilders 2022-2023



Categorizing your benefits makes it easy for employees to see exactly where the value is. Our Homebuilders sample is one of the most popular choices.

Each box represents a category of benefits and features an icon and short description of what's included. There's also space for a few line items, as well as the total for the category.

The front of the sample shows a total compensation bar chart as well as a benefit comparison pie chart. The letter from leadership allows you to send a message to employees and communicate the appreciation you have for their contributions.

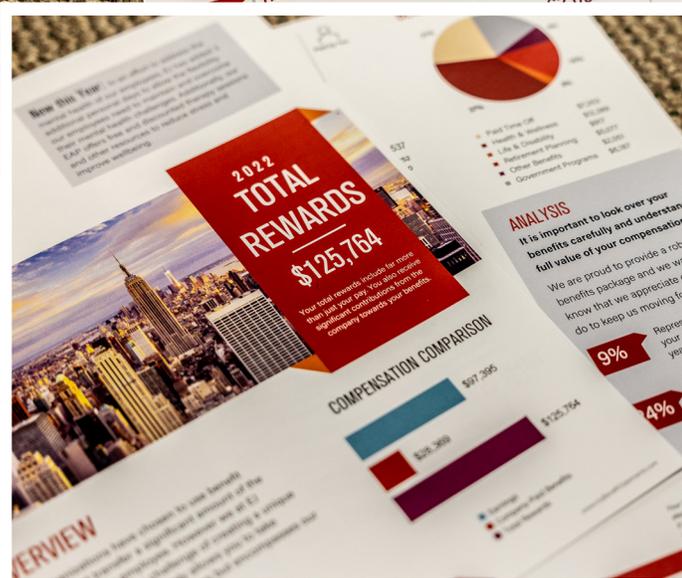
If an employee is not receiving a benefit, the section can be used to educate them on the benefit and encourage them to participate, or outline eligibility.



Features:

- Total Compensation side-by-side bar chart
- Benefit Breakdown pie chart
- Color-categorized benefits categories with descriptions
- Shows only company contributions to benefits

EJ Investing 2022-2023



Features:

- Compensation Comparison bar chart
- Benefit Breakdown pie chart
- Color-coded table with itemized benefits list
- Shows both company and employee contributions to benefits

Clean, simple, but with a lot of information - our EJ Investing sample is great when you have a lot of items to show.

The front of this statement features a callout box that is useful for pointing out new benefits or highlighting important information for employees. A large image can also lend to your brand image or promote community. There is also a compensation comparison bar chart, and space for a message from your leadership team.

The back features a full-length table with categorized benefits, showing both employee and employer contributions. The benefits are broken down in a pie chart, and an additional callout area allows for highlighting important data points.

TOTAL COMPENSATION STATEMENT

Total Compensation \$58,392

Earnings	Amount
Hourly Pay	\$40,500
Overtime	\$500
Paid Time Off	\$3,192
Vacation (10 days)	\$1,500
Holidays (3 days)	\$1,216
Sick (3 days)	\$480

Total Compensation: \$58,392

Benefits	Your Contribution	Company Contribution
Medical	\$0	\$10,000
Dental	\$0	\$480
Vision	\$0	\$200
Life & AD&D	\$0	\$150
Short-Term Disability (STD)	\$0	\$1,200
Long-Term Disability (LTD)	\$0	\$42
401(k) Retirement	\$2,000	\$420
Social Security & Medicare (FICA)	\$3,500	\$600
Federal Unemployment	\$0	\$600
State Unemployment	\$0	\$600
Workers' Compensation	\$0	\$600

Total Benefits: \$11,875

Total Compensation: \$58,392

Did You Know?
It takes the sale of 2000 widgets to pay for the benefits of one General Manufacturing Employee.

YOUR BENEFITS MAKE UP 20% OF YOUR TOTAL COMPENSATION

HEALTH & WELLNESS

INSURANCE & DISABILITY

We understand that your weekly paycheck means security for you and your family. That's why the company provides a comprehensive Life & AD&D insurance plan, as well as Short-term and Long-term Disability coverage. That means even if you are unable to work, you can still receive up to 60% of your weekly pay (up to \$2,000) to help cover your expenses.

FINANCIAL SECURITY

Take hold of your future today! We provide all full-time employees access to a free financial planner to help you reach your goals. Sit down with a planner today to discuss your current situation, your plans for the future, and how best to invest your hard-earned dollars.

Make an appointment today at: portal.employee-assist.com/finance

PROGRAMS

Club Adventure Outfitters	\$7,655
towards government man	\$1,791
Social Security, Medicare	\$42
Unemployment insurance	\$227
	\$351

“
you will find hardworking and dedicated employees. At Club Adventure Outfitters, we who efficiently utilize their time and talents to provide quality products and services that is why we provide competitive salaries and a comprehensive benefit program.
”

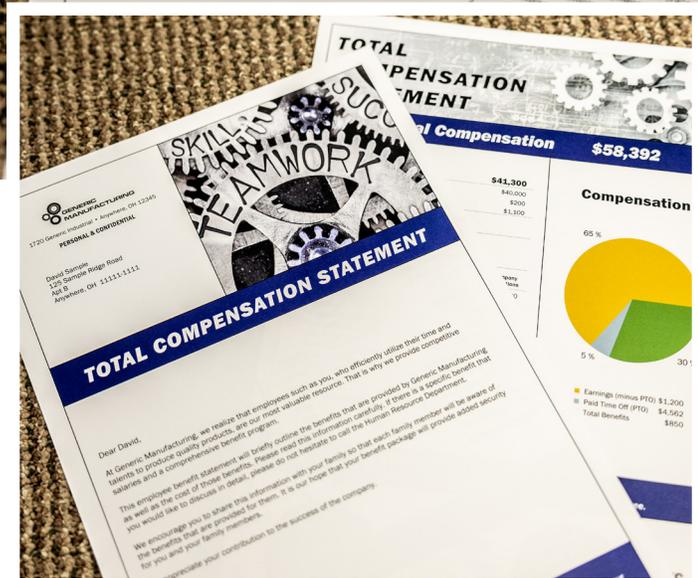
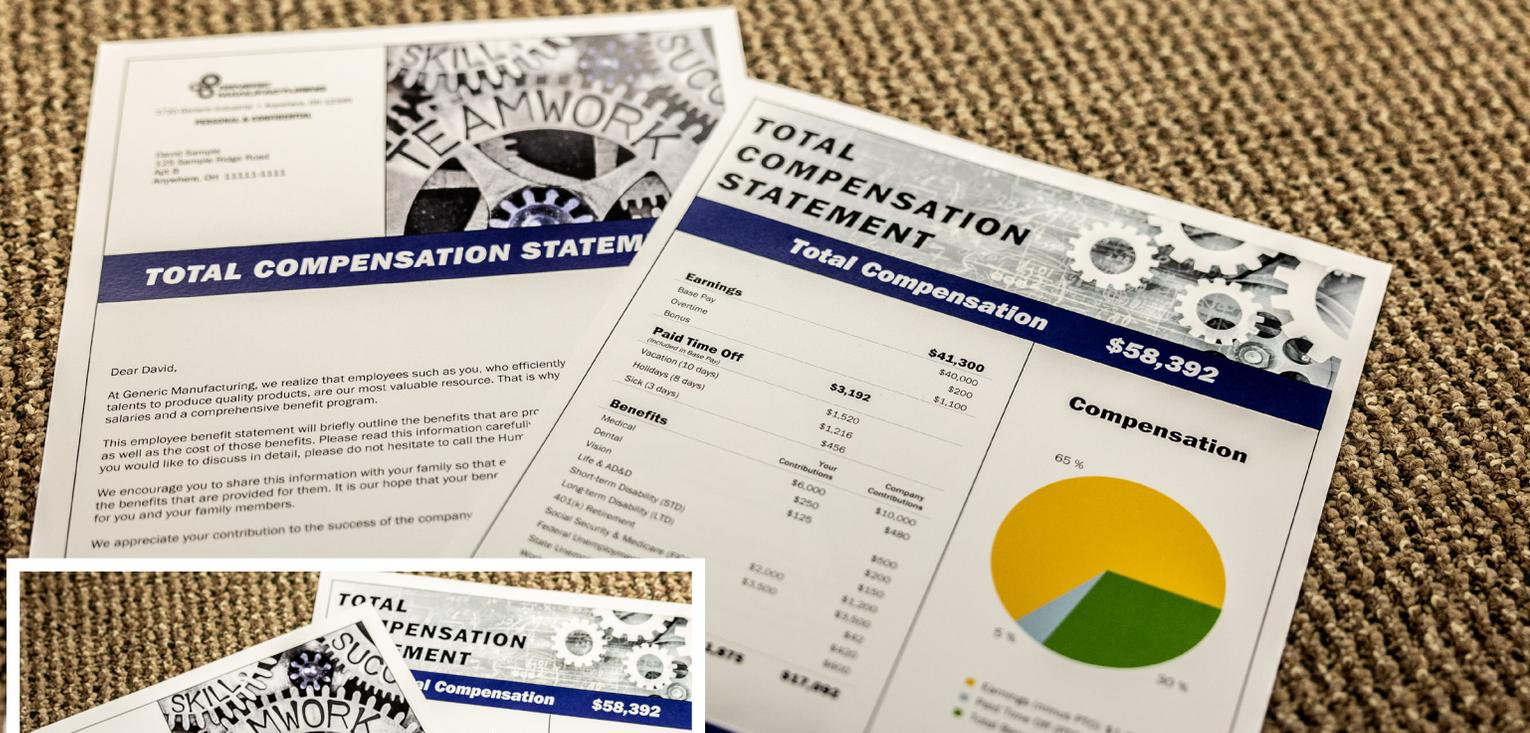
It briefly outline the benefits that are provided by Club Adventure Outfitters as well as read this information carefully. If there is a specific benefit that you would like to discuss all the Human Resource Department.

\$3,934

8.5" x 14"

LEGAL
Samples

Generic Manufacturing 2022-2023



This sample allows for a lot of flexibility and space to communicate your message. Large image areas on the front of the statement are a great place to enforce company culture along with a letter from leadership.

The back features an itemized table of benefits alongside a large pie chart illustrating the compensation distribution. A "Did you know?" section is great for highlighting company fun facts.

Next to the benefits breakdown pie chart, another important feature shows the percentage of the employee's total compensation that is made up by their benefits.

An additional benefits section allows you to list other perks that may not have a monetary value but are offered to your employees.

Features:

- Compensation Comparison pie chart
- Benefit Comparison pie chart
- Callout areas for highlighting benefits & additional information
- Shows both company and employee contributions to benefits

Club Adventure 2022-2023



Clean and categorized, our Club Adventure sample allows for flexibility and maximum impact!

The front of the statement offers bold image areas, callout boxes for important information, and space for a retirement chart.

On the back, each pay and benefit category has its own color-coded section with an itemized list and short description of what is offered in that category. Alternate verbiage can be shown for employees who are not receiving a benefit, or who are not eligible. Each of the headers also feature a large total to really highlight the value of how much you're contributing to their benefits.

While this statement only shows employer-paid benefits, it is also flexible enough to allow space for employee contributions as well.

Features:

- Maximizing Retirement bar chart
- Flexible callout areas to highlight important news and/or benefits
- Color-categorized benefits categories with descriptions
- Can show both employee and employer contributions to benefits



11" x 17"

BOOKLET

Samples

Total Health Network 2022-2023



Bold headers let each section of this statement stand out. The cover allows you lots of space to create a unique introduction that fits your brand image. Inside, each section is clearly marked to help employees navigate and understand their pay and benefits.

The retirement section shows just how much an employee may be missing out on by not maximizing a company match, while the earnings and benefits section clearly outlines each benefit alongside two pie charts visualizing the distribution of compensation and benefits.

On the back, a "Did You Know?" section allows you to point out important information to employees. It also includes a section that allows for a short description of the various benefits along with a visual icon.

Features:

- Retirement Planning section with bar chart
- Compensation & Benefit Breakdown pie charts
- Itemized benefits table
- Space for benefit descriptions and flexible callout areas for additional information

Investco 2022-2023



Our most unique and visual sample - the Investco sample allows for a variety of images and messages on the cover as well as an overview from the leadership team.

The inside is the main event of this statement, with large charts to allow an employee to easily see a visual representation of their pay and benefits. The pie chart at the top represents the distribution of compensation, while the bar charts at the bottom show a comparison of the company's contributions versus the employee's contributions toward their benefits. An itemized list also allows them to see the breakdown of each category.

The back also features a unique take on retirement planning - if your retirement broker has a suggested savings percentage, you can show employees how their current contribution (including company match) compares to the benchmark and provide powerful information for their future savings.

Features:

- Benefit Comparison bar charts
- Benefit Breakdown pie chart
- Color-categorized benefits categories with descriptions
- Shows only company contributions to benefits

Ohio Tech 2022-2023

TOTAL EARNINGS		TOTAL BENEFITS	
	\$47,005	Employee	Employer
Total Earnings	\$47,005		
Base Pay	\$42,000	\$900	\$4,500
Overtime	\$2,500	\$250	\$350
Bonus	\$750	\$150	-
Commission	\$1,100	-	\$70
Paid Time Off (Included in Earnings)			
Holidays	\$1,000		
Vacation	\$800		
Sick Days	\$300		
Total Benefits	\$18,265	\$16,155	\$18,265
Medical		\$900	\$4,500
Dental		\$250	\$350
Vision		\$150	-
FSA Admin Fee		-	\$70
FSA Medical		\$2,600	-
FSA Dependent Care		\$5,000	-
HSA		\$1,200	-
Life Insurance		-	\$125
AD&D		-	\$80
Long-Term Disability		\$25	\$30
Short-Term Disability		-	\$35
Voluntary Life		\$40	-

TOTAL BENEFITS

Health	\$4,995	Other Ben	\$1,387
Life & Disability	\$270	Gov	\$2,763
Retire	\$8,850		

TOTAL COMPENSATION 2022

Dear Frank,

At Tech Ohio, we realize that employees such as you, who efficiently utilize their time and talents to provide the best care possible, are our most valuable resource. That is why we provide competitive salaries and a comprehensive benefit program.

This employee benefit statement will briefly outline the benefits that are provided by Tech Ohio as well as the cost of those benefits. Please read this information carefully. If there is a specific benefit that you would like to discuss in detail, please do not hesitate to call the Human Resource Department.

We encourage you to share this information with your family so that each family member will be aware of the benefits that are provided for them. It is our hope that your benefit package will provide added security for you and your family members.

We appreciate your contribution to the success of the company.

\$47,005
\$18,265

TECH OHIO
1234 Dune Rd, Anytown, OH 12345-6789
PERSONAL & CONFIDENTIAL

Frank A. Sample
456 Arakis Rd
Apt. A
Anytown, OH 55555-4444

GENERAL INFORMATION

Tech Ohio offers holiday, vacation, and sick leave. We believe a work-life balance is important and all our employees need time away for rest and relaxation.

Tech Ohio provides medical and dental insurance for you and your family. For more information, please consult your employee handbook or Human Resources.

Life and AD&D, as well as Long-Term Disability and Short-Term Disability coverage, is provided by Tech Ohio for all of its employees.

To plan for the future, Tech Ohio offers a 401(k) plan, matching 50% of your contributions up to 6%.

Tech Ohio contributes on your behalf to Social Security, Medicare, Federal and State Unemployment Insurance and Workers' Compensation programs.

In addition to the benefits listed above, Tech Ohio also provides a \$300 clothing allowance toward the purchase of scrubs and shoes.

Big, bold graphics are a great way to help employees visualize the data you provide in their benefit statements.

By placing the letter from leadership on the front cover, it allows the entirety of the inner pages for displaying all the information about your benefits package. Large graphics and charts make it easy for the employee to see exactly where their benefits are coming from. Two large pie charts illustrate the benefits and earnings distribution, and additional graphics highlight the value of PTO and the employee's total compensation package.

The back side of the statement allows for flexibility of highlighting important information, such as benefit descriptions.

Features:

- Compensation & Benefits pie charts
- PTO Highlight section
- Itemized benefits table
- Benefit descriptions
- Shows both company and employee contributions to benefits

Our Process

Week 1 - Kickoff & Discovery

Your project manager will help you determine the goals of your project and guide you through the decisions needed to get started. During the kickoff call we'll get an idea of how to design your statements, what benefits you want to highlight, and how to best communicate your message to employees.

After your call, your project manager will provide a follow-up email with your data template, verbiage to update, and next steps in the process.

Weeks 2 & 3 - Layout & Design

Based on your company branding and the information gathered during your kickoff call, your project manager will develop a custom layout for your statement. Once your draft is ready, you can provide feedback and make adjustments as necessary.

Weeks 4 & 5 - Data Collection

While your design is being finalized, you will be collecting all of the necessary data that will be shown on your statements.

Week 6 - Data Submission

Submit your data via our secure FTP site and we'll begin reviewing and importing.

Weeks 7 & 8 - Audit & Testing

We'll pull a randomized test group of employees based on the data provided, to give an example of the various scenarios you'll see. This ensures that all data points are showing and any conditional text is operating correctly.

Weeks 9 & 10 - Data Revision

You'll receive and review your test group(s) of employees and have the opportunity to make any necessary revisions to the data to ensure accuracy.

Week 11 - Final Approval & Quality Assurance

Once you've given final approval of the data and test group, your statements go under an internal peer review to ensure there are no additional questions or concerns.

Week 12 - Fullfillment

Your statements will be professionally printed in-house and mailed out to your office or employees' home addresses. Your project manager will also provide you with all of your final documentation for your records.

90 Days after Completion - Sanitize & Archive

To ensure the security of your data, 90 days after the completion of your project we scrub all identifying data from your files and archive it for next year.

**this timeline represents a typical project. Your project timeline may vary.*

Additional Info



Design:

- What elements of the sample(s) do you like? What do you dislike?
- Is there a particular benefit or company feature that you would like to highlight (for example, retirement planning)?
- Do you prefer categorized benefits or an itemized table?
- What charts and graphs appeal most to you?

Data:

- What benefits do you offer that show a monetary value?
- Which benefits may not have a monetary value, but are still important for your employees?
- Will you be showing employee contributions, or only company contributions?
- Will you show a look back at the past year's historical data or annualize the data based on current earnings rates and benefit costs to show a year's worth of total compensation?

Delivery:

- When would you like to distribute the statement to your employees?
- Would you like the statements mailed directly to employees, or shipped to your office for distribution?



To request a quote, samples, or additional information:

425.452.3498

sales@naviabenefits.com