

PROVIDING COMPETITIVE K-12 BENEFIT SOLUTIONS

Stephens Insurance is built on lasting values and cultivating long-term relationships. We have earned a global reputation for our vision, integrity, and innovation. We tailor our insurance services to align with our clients' unique goals to minimize risk and strengthen their financial position.

Delivering Comprehensive Solutions in the K-12 Benefits Space

We serve as an extension of our clients' HR teams, decreasing their workload and allowing valuable time to be directed at other key aspects of their operations. Our in-house attorneys guide our teams and clients in all areas of employee benefits compliance for health and welfare plans. They support you in understanding the reporting, notice, and compliance rules that impact plan administration through education, collaboration, and practical compliance tools and content.

Competitive Benefit Solutions

- In-house analytics expertise allows us to present the most competitive benefits package for both certified and classified staff

Open Enrollment & Employee Onboarding

- One-on-one enrollment counseling maximizes plan clarity and education around your benefits package, emphasizing the resources available to plan participants
- Ongoing enrollment and education for newly eligible employees
- Self-enrollment option for those who like to complete their benefit enrollment on their own time

Technology Solutions

- In-house technology team who build and maintain benefit administration platforms and train clients on how to use these systems

Bill Reconciliation

- Bill reconciliation integrates with the client's budget system to ensure that transactions are authorized and current

Ongoing Support

- Stephens representatives serve as liaisons between members, providers, and carriers to resolve disputes and answer coverage questions
- Experienced account team members provide assistance in resolving carrier service issues
- Benefit advisors consult on key provisions of plan documents, summary plan descriptions, contracts, and other benefits-related documents

Robust in-house resources enable us to effectively respond to the evolving needs of our clients

Data Analytics & Benchmarking

Data drives our strategy for managing benefits solutions. We systematically monitor financial and utilization reports and then compare performance to survey data from the nation's largest benchmarking survey. This analysis allows our clients to quickly respond to emerging trends and identify new opportunities.

Consulting Resources

- Plan Design Review & Implementation: We assist in designing and implementing benefit plans that reflect our clients' unique priorities.
- Plan Administration Solutions: We configure, maintain, and support clients on our selected partner portal, or can assist with the initial set-up and configuration of the client's benefit administration system.
- Benefit Communication & Enrollment Strategies: We work with clients to develop customized awareness flyers, newsletters, and enrollment tools to ensure that plan information is effectively delivered to members.
- HR Tools: We act as an extension of your HR department, providing a specialized array of personalized services, including interactive online tools to facilitate employee enrollment, employee/HR communications, and plan management and compliance.
- Compliance: We help clients navigate the evolving employee benefits regulatory environment by providing guidance, subject matter content, compliance alerts and assistance with identifying compliance vendors, and general advisory support. We help you navigate employer sponsor obligations under health care reform, COBRA, HIPAA, ERISA, IRS rules for cafeteria plans, benefit continuation laws, and others. We deliver both in-house expertise and web-based tools that help clients meet their compliance obligations.

Voluntary Employee Benefits

A company-endorsed voluntary benefits program is a great way to enrich your benefits package, helping to attract and retain employees. Our benefits advisors and specialized marketing personnel can structure a robust employee-paid voluntary benefits offering that:

- Provides innovative products at affordable group rates
- Enables employees to pay premiums through convenient payroll deduction



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As the Director of K-12 Partnerships, Scott serves as an advisor to public education entities, helping develop employee benefits programs that maximize profitability while retaining employees and meeting compliance requirements. Scott has over 15 years of experience in the public school sector of employee benefits. Prior to Stephens, he was Partner at Educators Financial Group, providing school districts with income planning solutions.

Stephens Insurance

Stephens Insurance, an affiliate of Stephens Inc., is headquartered in Little Rock, Arkansas and is one of the largest privately owned insurance brokerages in the United States. There are currently 200+ associates throughout Stephens Insurance's network of offices in Birmingham, Fayetteville, Houston, and Jackson.