

2024-2025

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, we 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.

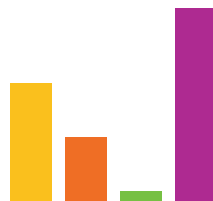
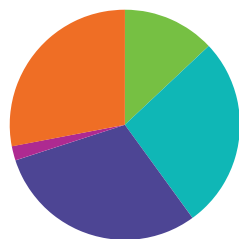


How to use these Samples

Every statement that we produce allows you to customize it to fit your company branding, colors, and the message you want to deliver to employees. These examples are intended to provide you with a starting point from which to build your custom statements. While the process of getting from initial template to final product may vary based on what you're trying to achieve with your benefit statements, we can guide you through the process.

1. Understand the Samples

Review each sample on the following pages to understand their structure and components. Identify key elements that you may want to include, modify, or customize for your statements. Keep in mind that every piece can be broken down into individual elements like charts, tables, images, and text.



YOUR BENEFITS

Medical Insurance	\$8,712
Dental Insurance	\$322
Life Insurance and AD&D	\$312
Long Term Disability	\$45
401(k) Profit Sharing	\$3,200
Social Security/Medicare	\$3,069
Federal Unemployment	\$42
State Unemployment	\$191
Workers Compensation	\$222

TOTAL BENEFITS \$18,406

Base Pay	\$40,000
Overtime	\$3,700
Bonus	\$2,500
Included in Base Pay	
Holidays	\$1,368
Vacation	\$1,520
Sick Days	\$760

2. Identify Requirements

Based on your company values and goals for this compensation statement, clearly define your specific requirements. What do you want to communicate to employees? How can we help provide them a clear understanding of their pay and benefits package? This might include specific design elements or content such as retirement sections, benefit descriptions, or callouts for new or underutilized benefits.

Retirement Planning

You are currently contributing 3%.

In order to maximize Total Health's match, your minimum contribution should be 6%.

Retirement contributions are matched by Total Health at a rate of \$1.50 per \$1.00 deferred, up to 6%, based on eligible compensation for the calendar year, as defined in the Summary Plan Description.

Actual Match: \$600
Max Potential Match: \$1,200

Last year you missed out on \$600 because you were not contributing at the maximum match level for the entire year.

Scan the QR code for more information about your retirement plan.

Note: In preparing this personalized benefit statement, we have made every effort to assure that the information depicted is accurate. In case of any conflict or omission the legal plan documents will prevail.

We can customize your statements to help accomplish those goals.

3. Adjust Design

Whether you start from one of these samples as-is, mix and match, or build your statement completely from scratch - every sample is designed to be flexible. Our project managers can help you transform it based on your brand guidelines, vision, and company goals.

Adventure Outfitters

100% Company Owned • Membership 100% skills
Sally Sample
123 Main Street
Daphne, AL 36526

COMPENSATION & BENEFITS BREAKDOWN

Base Pay	\$40,000
Overtime	\$3,700
Bonus	\$2,500
Medical Insurance	\$8,712
Dental Insurance	\$322
Life Insurance and AD&D	\$312
Long Term Disability	\$45
401(k) Profit Sharing	\$3,200
Social Security/Medicare	\$3,069
Federal Unemployment	\$42
State Unemployment	\$191
Workers Compensation	\$222

ARE YOU MAXIMIZING YOUR RETIREMENT?

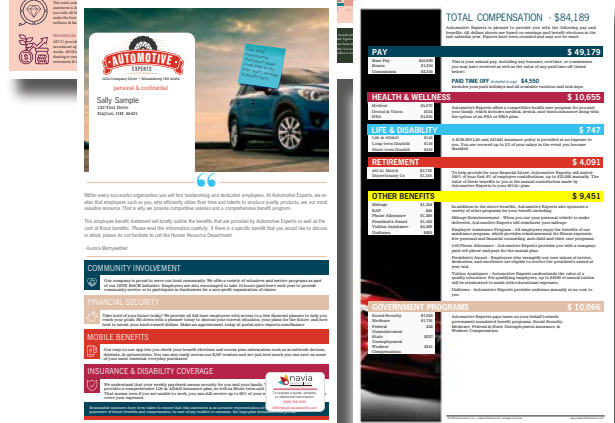
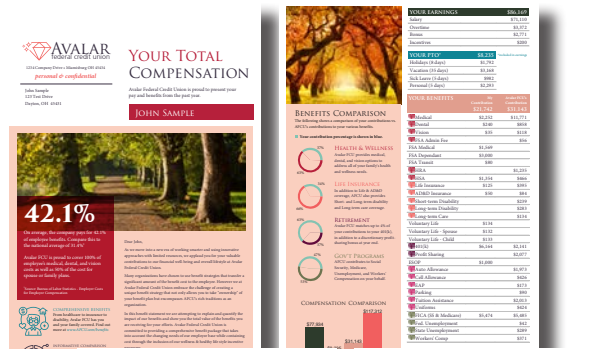
Actual Match: \$600
Max Potential Match: \$1,200

Last year you missed out on \$600 because you were not contributing at the maximum match level for the entire year.

How to use these Samples

START FROM A SAMPLE

Use one of our samples as a base, and customize with your photos, colors, fonts, and message.

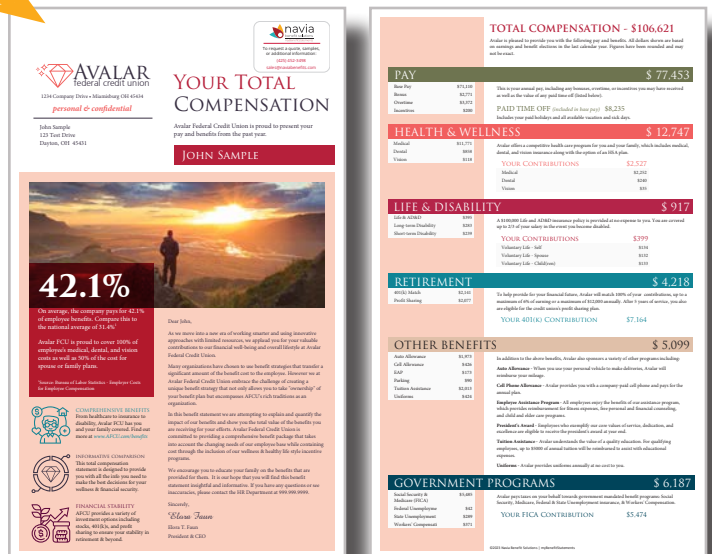


MIX AND MATCH

Select the components you like from various samples and we can combine them to create a cohesive look and feel. For example, add a retirement section on a sample that doesn't already include one. Swap a bar chart for a pie chart. The options are endless!

OR WE CAN START FROM SCRATCH!

We love helping clients bring their vision to life - let's discuss what you want to include and your project manager can help you create a completely new, custom statement.





8.5" x 11"

LETTER

Samples



Estate Escape 2024-2025



Based on one of our most popular layouts, Estate Escape has ample space for a statement from leadership and offers great flexibility for incorporating impactful images and charts to illustrate your benefits.

The benefits table on the reverse side is color-categorized for easy identification. The breakdown section succinctly presents the allocation of company-paid benefits in a variety of categories, accompanied with brief descriptions of the benefits package.

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

Production Central 2024-2025



This new and improved layout boasts striking graphics and lots of room for benefit descriptions and branded photos.

Highlight the significance of both benefits and pay through the impactful stacked bar chart on the front, complemented by an expansive section for a message to employees.

The reverse side prominently features charts to illustrate your total comp package - including a compensation comparison to visually represent pay, PTO, and benefits. Below, a spacious itemized benefits table allows you to comprehensively list every benefit an employee receives. Another noteworthy feature is the retirement chart, offering employees insight into the value of saving for their future and illustrating your company's contributions 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

COMMUNITY INVOLVEMENT

Briar Rose Nursery is proud to serve our local community. We offer a variety of volunteer and service programs including tree and flower donations, beautification projects, and our GIVE BACK initiative.

Employees are encouraged to take 16 hours paid leave each year to provide community service or to participate in fundraisers for a non-profit organization of choice.

WELLCHECK CLINIC
Company Drive • Mansfield OH 44844
ONLINE & CONFIDENTIAL

ORDER FOR: **Example**
1 Drive
OH 45410

WELLNESS STATEMENT

Service Award	Value
Medical (30 days)	\$1,927
Disability (30 days)	\$2,192
Retirement (30 days)	\$9,500
Government (30 days)	\$1,370
Total	\$15,089

MAXIMIZING YOUR RETIREMENT
\$6,418

Annual Yearly Reduction

INSURANCE & DISABILITY

We understand that your weekly paycheck means security for you and your family. That's why Briar Rose Nursery 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.

INFORMATIVE COMPENSATION

This total compensation statement is designed to provide you with all the info you need to make the best decisions for your wellness & financial security.

FINANCIAL STABILITY
AFCU provides a variety of investment options including stocks, 401(k)s, and profit sharing to ensure your stability in retirement & beyond.

Sincerely,
Elora T. Fau
Elora T. Fau
President

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 [\[link\]](#) or call [\[number\]](#).

Did You Know?
It takes the sale of 1000 widgets to pay for the benefits of one Generic M

Benefits

Medical	\$11,875
Disability	\$420
Retirement	\$600
Government	\$17,092

Sincerely,
Alligatora
Alligatora
President

8.5" x 14"

LEGAL

Samples

Generic Manufacturing 2024-2025



Features:

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

Our Generic Manufacturing sample provides extensive flexibility with expanded space to convey your message. Reinforce your company culture, branding, and show your appreciation with plenty of room for impactful images.

On the reverse, a detailed benefits table and pie chart illustrate the distribution of each individual's compensation package. A "Did you know?" section serves as a vibrant space to showcase interesting company facts or inform staff of upcoming events.

Another important element highlights the percentage of the employee's total compensation attributed to their benefits. This is an important benchmark to illustrate just how much additional value your benefits package offers.

Avalar Credit Union 2024-2025



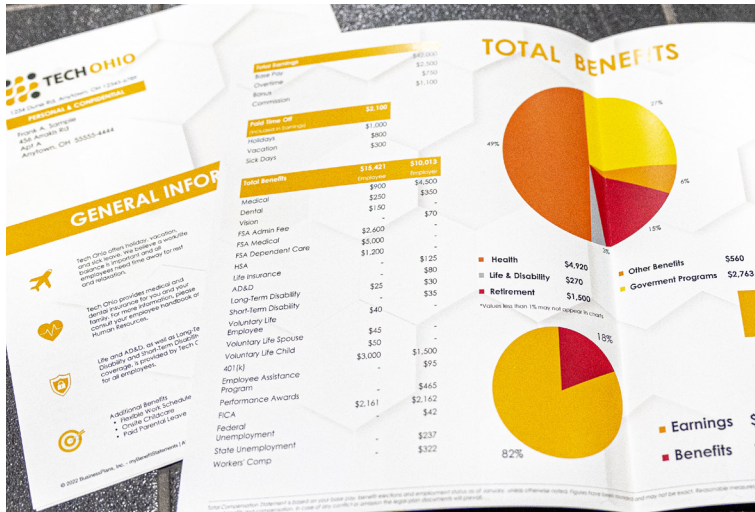
New this year, our streamlined Avalar Credit Union sample offers both flexibility in your layout and a powerful visual impact.

The front allows you to showcase vibrant images alongside important benchmarking statistics and informative call-out sections. On the reverse, each pay and benefits category is thoughtfully color-coded with plenty of space for detailed benefit descriptions. This gives you the ability to show individual benefits in a list, or simply show totals for each of the various categories of benefits you offer.

This highly adaptable design allows for a wide variety of customization in order to fully encompass all of the details of your company benefits package.

Features:

- Flexible call-out areas to highlight important news and/or benefits
- Color-categorized benefits categories with in-depth descriptions
- Can show both employee and employer contributions to benefits



11" x 17"

BOOKLET

Samples

Total Health Network 2024-2025



Clean and modern with striking headers, this statement stands out. The cover provides ample space for imagery that can be tailored to your brand guidelines. Inside, each section is prominently marked with bold graphics to facilitate easy navigation and comprehension of pay and benefits for employees.

The retirement planning section underscores potential opportunities that employees may be missing by not maximizing your company match. Meanwhile, the total compensation table delineates each benefit and pay item complemented by a pair of pie charts illustrating the distribution of those items.

Flipping to the back page, a "Did you Know?" section serves as a platform to highlight essential information for employees. Additionally, a dedicated space allows for concise descriptions of the various benefits accompanied by visual icons for quick recognition.

Features:

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

Workhorse Industrial 2024-2025



Features:

- Company Culture & Mission section
- Flexible call-out areas for additional information
- Compensation & Benefit Comparison pie charts
- PTO Call-out section
- Retirement Planning section

Workhorse Industrial allows you to condense a wealth of information into a single, user-friendly statement. This sample takes a distinctive approach by placing unique emphasis on Paid Time Off (PTO) to enhance the value of a robust vacation policy - or modify it to highlight your benefit plan's best asset!

Incorporate vibrant imagery and your brand colors to really pack a punch with design. The inclusion of company facts and culture provide a comprehensive overview about what makes your business unique. Remember - total compensation goes beyond pay and benefits! Additional perks can be showcased in a variety of ways.

On the back, there is ample space dedicated to essential retirement planning information. It includes a comparative analysis of an employee's current saving against their maximum potential, offering valuable insights for financial planning.

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 - Fulfillment

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