

# Navia lifestyle benefits promote unique corporate culture

Head of Human Resources uses Navia to create and expand magnetic culture at a leading financial technology company

## navia | Case Study

### Employer

Sector: Financial technology

Size: 100 employees

Locations: California,  
Toronto, Nevada

Benefit services: HSA, FSA,  
HRA, GoNavia Commuter,  
Wellness, Pick-a-Perk,  
Fertility, Adoption



A leader in the Buy Now,  
Pay Later travel segment

What do charity donations, professional development, vacations, and student loan repayments have in common?

Traci Oberman will tell you they are all part of an innovative lifestyle benefit program offered at Uplift where she is head of Human Resources.

Uplift, a financial technology company, is a leader in the enterprise travel and Buy Now, Pay Later (BNPL) industry. Traci notes, "We let you make memories by attending that important reunion or funeral even if short on cash courtesy of Uplift's flexible loan programs and partnerships with airlines, hotels, and other travel related businesses."

Traci clearly enjoys her work and the flexibility to design a benefits program to meet the demands of a tight labor market and the company goal of fostering a magnetic culture.

"The culture is what sells our company to candidates. An emphasis on work/life balance is embedded in that culture."



## Challenge: Foster work/life balance via benefits

01

Weight loss program

02

Ski lift tickets

03

Rock climbing

04

Professional development

05

Student loan repayment

While Uplift offers traditional consumer driven healthcare plans like Flexible Spending Accounts (FSA) and Health Reimbursement Accounts (HRA), they also wanted to provide some unique "lifestyle" benefits. Their "Pick-a-Perk" benefit gives employees a choice while promoting one of Uplift's core values - an emphasis on work/life balance.

"That work/life balance is embedded in our culture," Traci says.

*"Work has to be fun if you're going to see the same folks day in and day out."*

"And the culture is what sells our company to candidates," which helps with the recruitment and retention of good employees.

Uplift was willing to fund benefits to better complement employees' lifestyles. "We wanted to walk the walk, not just talk the talk and we're backing that up with dollars that people can use for what they want," she notes.

"We want employees to have dynamic, flexible benefits that speak to what's important to them."



## Lifestyle Solutions from Navia

01

Pick-a-Perk  
benefit

02

Wellness  
benefit

03

Adoption  
benefit

04

Fertility  
benefit

To help implement those programs, Traci found the right partner in Navia Benefit Solutions which "provided a one-stop solution for our targeted programs. We are lean and mean and with Navia we were able to bring on these unique programs."

Navia administers Uplift's traditional consumer driven healthcare accounts: Health Savings Account, Healthcare, Day Care, and Limited Purpose FSA, and the GoNavia Commuter Benefit-- programs that provide significant tax savings for employer and employees.



But in keeping with Uplift's core value of life/work balance, Navia also rolled out two Uplift-customized lifestyle benefits: Pick-a-Perk and Wellness.

"My favorite is our Pick-a-Perk benefit which gives employees a pool of money that they can spend on any mix of six categories: professional development, charitable donation, tuition reimbursement, vacation savings fund, student loan repayment, and home office extras," says Traci who used the perk to purchase a bike to help rehab a broken ankle.

Employees are encouraged to maintain an active, healthy lifestyle through the second benefit, the Wellness Reimbursement Plan, which reimburses for ski passes, weight management or weight reduction programs, personal trainers, stress reduction classes and nutritionists. Further, as part of the family of lifestyle benefits, so to speak, Uplift also offers a Fertility Benefit and an Adoption Benefit.



## Results of partnering with Navia

01

Employee retention

Those lifestyle benefits help crystalize that company culture is so special to Uplift. "You want to work with people who want to have fun because you see these same people every day. Pick-a-Perk is one of the top benefits that our employees utilize every year...the employees love it. Choice is very important for them," Traci says.

We wanted employees to be able to better manage their lifestyles, and we feel we've given them tools to do that," Traci notes.

The new lifestyle programs have been so popular at Uplift that Traci says other organizations have heard of their success. "I know other companies that now do some of the things we've done with Navia," she said with a hint of proud achievement.

And this year Traci is looking forward to using the Pick-a-Perk benefit for something other than rehabbing a bum ankle.

**"Employees love the Pick-a-Perk benefit. It's our #1 benefit of choice!"**

Traci and her employees will have their choice of six categories: Professional Development, Tuition Reimbursement, Student Loan Repayment, Work Office, Charitable Donations, or Vacation Savings. Tahiti anyone?

02

Candidate attraction

03

Navia showcases Uplift's creativity

*"What I really like about Navia is mid-COVID when everyone was having customer service issues, Navia was extremely proactive in letting their customers know what was happening. Employees give them high marks for that communication."*

### Peer-to-peer Advice



I think it's always important to listen to your employees and provide them with a platform of benefits that complements their lifestyles. You want to provide benefits that don't get in the way, that are always on their side and Navia is one of the tools to help us do that.

- Traci Oberman





# Ready to boost your benefits experience?

Request a quote from Navia anytime and we will respond promptly with the help you need! **[Request a Quote here.](#)**

