



The 2024 outcomes exceeded our worksite goals. The outlook for 2025 is even better.

Why you should consider Assurity as your go-to-carrier for worksite benefits



By **JACK DOUGLAS**
VICE PRESIDENT, WORKSITE SALES

2024 was a breakout year for Assurity Worksite Sales. Not only in sales terms, but in the important wins secured for distribution and our clients.

Having the majority of our team in place early in the year laid the groundwork for our success, especially when combined with the caliber of this team. We have a combined 248 years of industry experience on our sales management team right now.

All the pieces are in place for even better outcomes in 2025, but before we look ahead, let's look back at all we accomplished together in 2024.

THE HIGHLIGHTS

Big Picture: Big Success

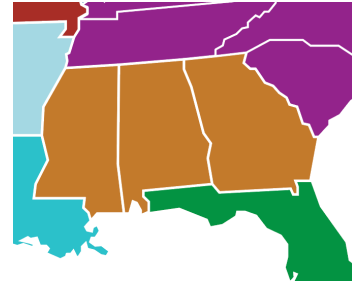
Projected sales for the year were **up 27 percent over 2023** and were **roughly 13 percent over goal**. Why?

- **A good team with good partners.** Many of our WS leaders have been together for multiple years. We encourage each other. We help develop each other as teammates and we expect to win as a team.
- **Our brokers.** We have the best worksite distribution in the business, strengthened even more with the addition of some key brokers over the year.
- **The Home Office Team,** who deserve their own recognition. Worksite Group Administration, Business Transformation and our Product and Actuarial teams worked hard to make sure our producers get the service they warrant.

New Territory

We added the Gulf Coast Region of Alabama, Georgia and Mississippi. Our team there hit the ground running and had an outstanding year.

We also extended Worksite group coverage eligibility to New York residents who are employees of non-New York employer groups, opening up opportunities we haven't had before.

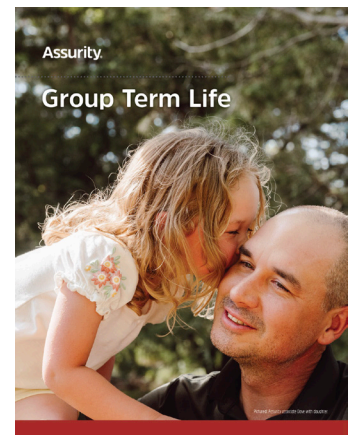


New Product

We launched our new Group Term Life Insurance product in August and sales have exceeded expectations.

It also came with a great side effect: Group Term Life has helped boost the sales of the existing Group Whole Life product.

Add it to your portfolio today if you haven't already. Group Term Life Insurance is in-demand industry-wide, and our version stands out with its winning combination of flexibility, affordability and portability.



Better Processes

This year also included important improvements that ultimately aid our customer service and ease of service, saving our distribution time and making it even easier to do business with Assurity:

Claims Access Online – Claim status became available 24/7 on AssureLINK. No more phone calls or downtime hunting for claims specifics. All the claims' details are online in one location, everything from the date a claim was received to payment details. You can also access checklists with clear instructions on filing a claim to assist your clients.

Effective	Start/End	Client	Policy Number	Policy Type	Status
10/15/2024	2024/01/01/2025	John Doe	9001234567	Accident Expense	Processed
10/15/2024	2024/01/01/2025	John Doe	9001234567	Accident Expense	Processed
10/15/2024	2024/01/01/2025	John Doe	9001234567	Accident Expense	Processed
10/15/2024	2024/01/01/2025	John Doe	9001234567	Accident Expense	Processed
10/15/2024	2024/01/01/2025	John Doe	9001234567	Accident Expense	Processed

Production Reporting – This AssureLINK upgrade put production details in one dashboard, allowing you to view production by group, product, customized time frames and more, on a desktop or mobile phone. Having all the production details you need at the ready – from effective dates for coverage to filters and production comparisons – is another way managing your Assurity business became a little easier in 2024.

View As	Group Count	Policy Count
\$6,697.48	5	16

Product	Group	Agent	Policy Detail
Life of Business			
Totals			
Health			
Accident Expense			
Group Pre-24 Hour Accident Expense			
Group Accident Expense			
Critical Illness			
Regular Sickness			
Life			

MyAssurity Claims Enhancements – Employees now can submit their claim on MyAssurity.com and follow its status - from submitted to paid - online at any time.

Employer E-consent – This addition makes enrollment faster and more flexible for employees, enabling electronic certificate delivery via our customer portal, MyAssurity.

It was rewarding to offer each of these additions and enhancements to distribution this year, providing more tools to support the great work you do.

You can combine them with our existing tools that help you stand out, including:

- Worksite Proposal System (makes quoting easy)
- Custom websites with group-specific information and educational videos. (makes education and engagement easy)

There's even more ahead to help make business easier for you and your customers. Another round of enhancements is planned in the new year, such as:

- Additional upgrades to our Employer Portal
- Custom Spanish proposals and enrollments books
- A new user-friendly Agent Portal, replacing Assurelink

So, make Assurity part of your plans in 2025 and catch our momentum. You can work toward the 2026 Leaders' Conference, too, which we just announced will be in Maui!

As always, we are here to answer any questions. Reach out to your Regional Sales Team:

www.assurity.com/agent-center

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