

# Alera Best Next Steps

2026



“PEOPLE WILL FORGET  
WHAT YOU SAID, PEOPLE  
WILL FORGET WHAT YOU  
DID, BUT PEOPLE WILL  
NEVER FORGET HOW YOU  
MADE THEM FEEL”

~ Maya Angelou

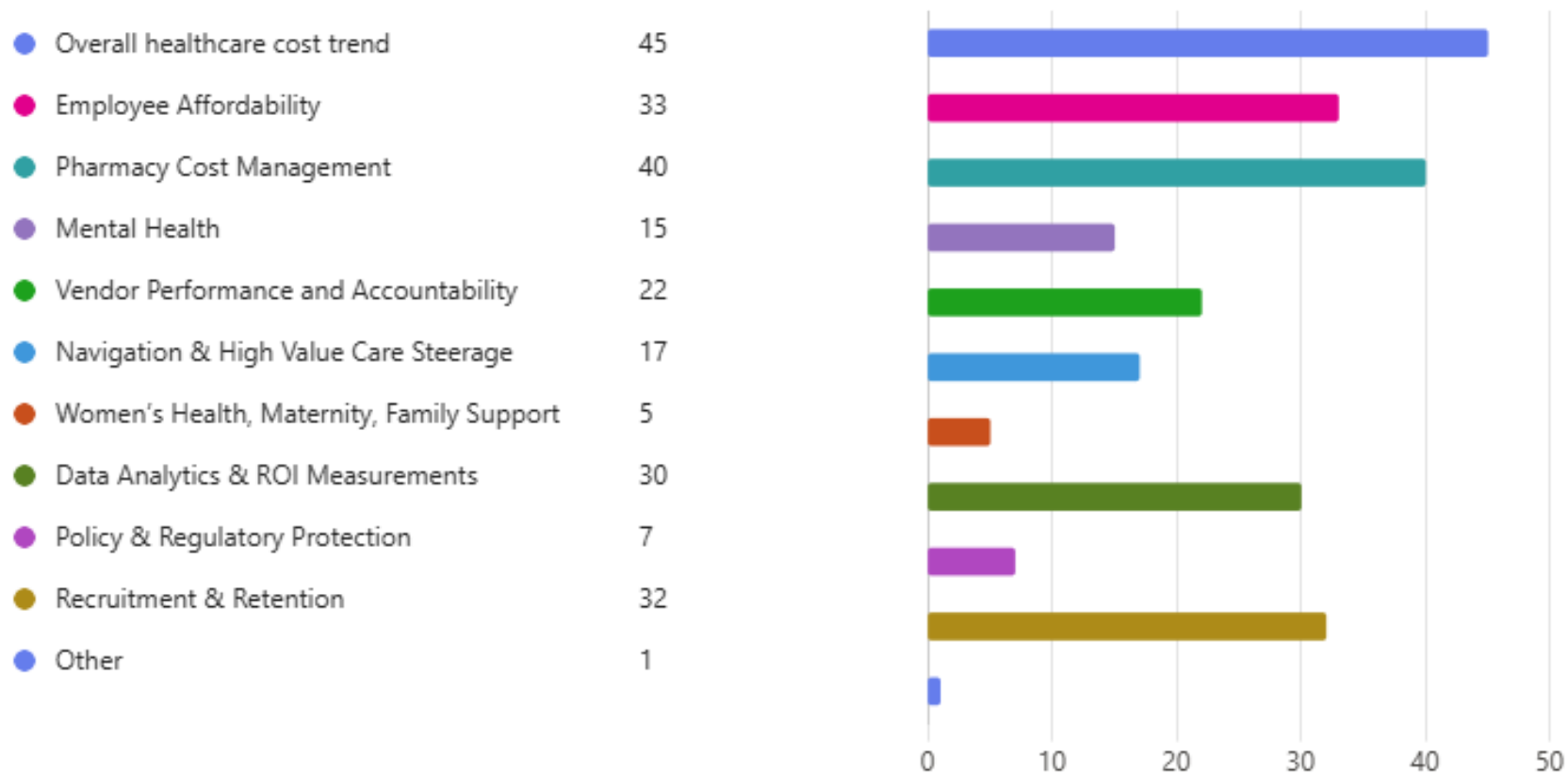
# We help HR and finance leaders feel confident in their strategy

not because costs stop rising  
but because  
decisions are intentional  
risk understood  
and trade-offs are clear

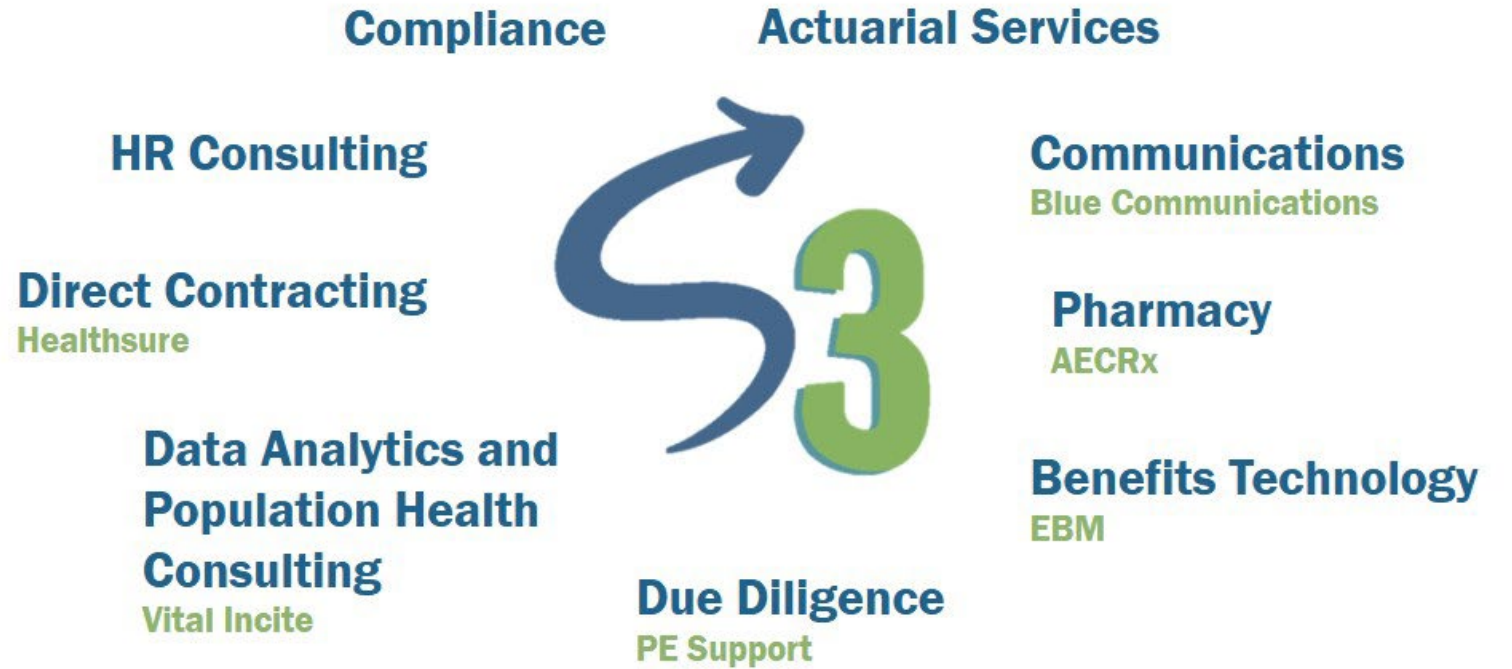
- **CFO Confidence** Comes with Clarity- not Certainty
- Translate “HR Pain” into Business Signals (**make HR feel seen**)
- Anchor **Strategy to External Reality**
- Show a **Line of Sight** from Decisions to Outcomes
- Position Alera Group as a **Steady Operator**, Not a Fire Alarm responder.

# 2026 Alera Priorities

- Result of Day One Survey and feedback from what People are focused on.



# Alera Collaboration



# Group Think Tanks



- **Doing 2 tables for each topic**
- **Move to a table that most speaks to you**

# How do we create a “feeling” that our clients will never forget?

Develop:

- Smoke Signals that something can be done
- What services should have been or will be leveraged?
- What other support do you need Alera to develop?

## Tables: 1 and 3

Differentiate the services offered to support a Fully Insured Group 150 ee

## Tables: 4 and 6

How do we make sure we are supporting our client's Fiduciary responsibility?

## Tables: 7 and 9

Employer in financial trouble, small HR team, received a 21% rate increase and missed budget last year.

## Tables: 10 and 12

New CFO has taken over and has their buddy telling them they can really help the group.

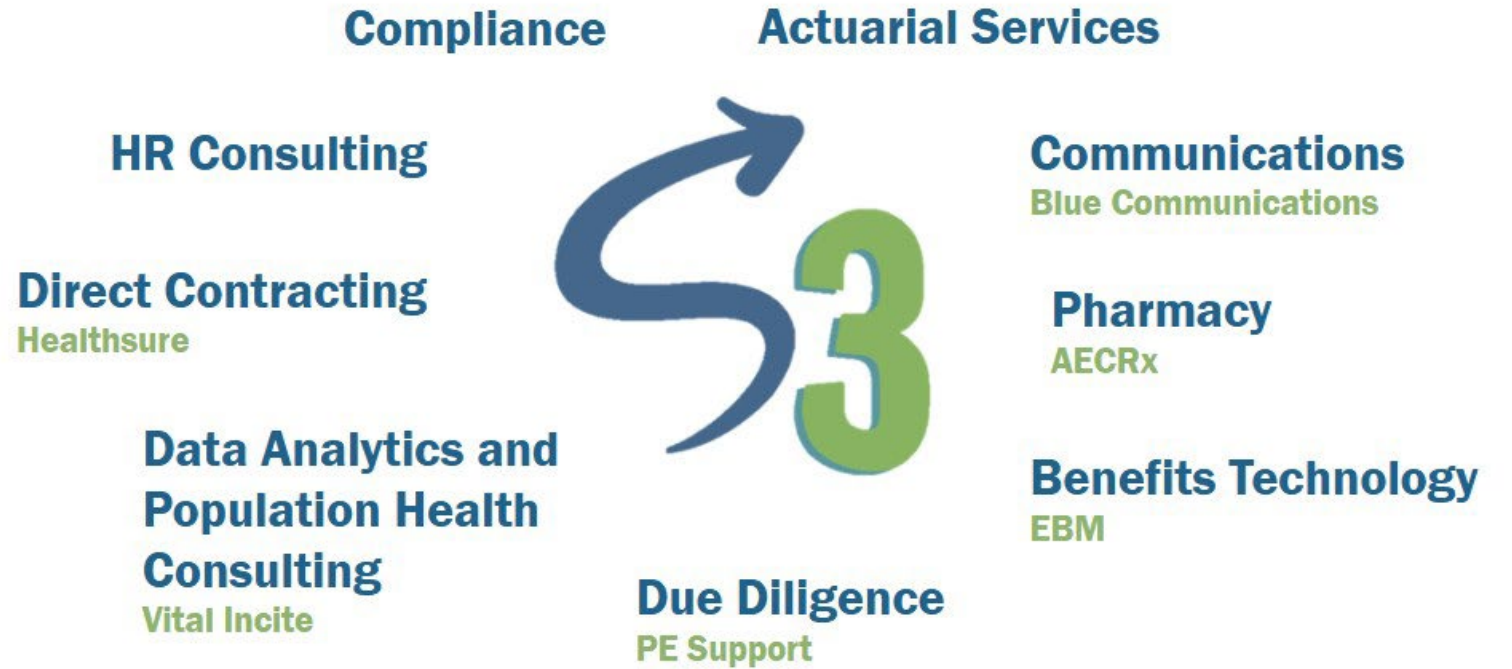
## Tables: 5 and 11

Employer is in a market with extremely high cost of care- Employees do not appreciate their benefits.

# Meeting Objectives

- A clearer, more effective approach to delivering memorable, high-impact client support
- A stronger understanding of the biggest challenges employers are facing
  - including strategies that have worked, and those that have fallen short
- Insight into government policy changes that may influence benefits strategy and plan design
- Practical guidance on identifying and implementing advanced strategies, including direct contracting
- A better understanding of what private equity firms expect from employee benefits advisors
- A sharper perspective on when communication can deliver greater ROI
- Stronger peer relationships to support collaboration and drive better outcomes

# Alera Collaboration





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