

Sample Presentation



Benefit Consultants, Inc.
CBC Insurance Services CA Lic # OD06550

“My Mission is to lead a productive life, centered on high integrity, ideals and principals, and to lead my staff by example with a positive attitude.”

“My goal is to achieve financial success for CBC while maintaining the basic premise that the interest of the client always comes first. I commit to continued education and training in order to maintain the highest level of knowledge in my field.”

Judy Burlingham, CEO
Coast Benefit Consultants, Inc.

Section 1: Introduction

About Coast Benefit Consultants

Coast Benefit Consultants, Inc. (CBC) is a full-service employee benefits consulting firm. CBC provides employee benefits solutions to employers in a broad range of industries and sizes. Our mission is to enable our clients to achieve maximum value from their investment in employee benefits. We treat our clients as we would want to be treated.

Experienced Consultants (1990)

Our knowledgeable team of six consultants has twenty plus years of experience in employee benefits. We provide full support to ensure your benefit plans are in compliance with federal and state regulations. Our long term relationships with carrier decision makers and claims supervisors allow us to assist you and your employees with any challenges that may occur.

Client-Focused Service

Coast Benefit Consultants takes pride in providing the highest level of customer service to each of our one hundred eighty plus clients including; but not limited to benefit education, administration, and claims. We serve as your advocate with the benefit plan carriers and their contracted providers for billing, claim, enrollment, referral and eligibility problems. CBC contracts with an HR firm to provide assistance to our clients.

Provider Relationships

Coast Benefit Consultants' considers our relationships with benefit plan providers and related vendors an integral part of our ability to provide superior results. Our reputation with benefit plan providers and vendors of being fair, honest, and dedicated to our clients to receive the best possible results. As your benefits consultant, we are the liaison between you and carriers to resolve all administrative issues; enrollment and claims.

Employer/Employee Communications

The best-designed benefit plan will not produce employee satisfaction if it is not communicated and implemented properly. Coast Benefit Consultants' employee benefit communication materials are customized for each client, and provide employees with benefit information in a manner that is informative and easy to understand. We can accommodate our clients with benefit packets and readily available communication via hard copy bound packets and/or online website based benefit portals. These communication materials allow employers to clearly and effectively communicate benefit plan and claim information to employees.