

**Fisher Associates**  
**STRATEGIC INITIATIVES - 2020-2021**

| Action                                                        | Responsible Party        | Comments                                                                                                                                                            | Expected Completion | Open/Closed |
|---------------------------------------------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------|
| Captive Meeting                                               | Lawley/Fisher Associates | Fisher Associates invited to attend our Captive meeting in Skaneateles to learn more about Captive Programs                                                         | June 20th           | Open        |
| Lawley Awarded Broker of Record                               | Lawley                   |                                                                                                                                                                     | 07/01/20            | Open        |
| Enroll Fisher Associates in HR hotline Service through Mywave | Lawley/Fisher Associates | HR hotline to ask questions to HR professionals                                                                                                                     | 07/01/20            | Open        |
| Compliance Review                                             | Lawley/Fisher Associates | Lawley will provide overview of compliance services and resources available and introduction of Judy Kamens --Compliance Specialist at Lawley                       | 07/15/20            | Open        |
| Data Gathering                                                | Lawley/Fisher Associates | Lawley will obtain all necessary information from carriers, rates, plan design and <b>benchmark</b> against our book of business and make recommendations           | 8/1/20              | Open        |
| Wellness Discussion                                           | Lawley/Fisher Associates | Introduction of Nicole Sporoba, Wellness Consultant, at Lawley to discuss strategies around building a wellness program                                             | 08/15/20            | Open        |
| Alternative Funding Discussion                                | Lawley/Fisher Associates | Lawley in conjunction with underwriting team will educate Fisher Associates on options for funding medical plan -- <b>fully insured, captive, self-funding</b>      | 08/20/20            | Open        |
| Medical Rates Discussion                                      | Lawley/Fisher Associates | Lawley in conjunction with underwriting department will provide information on how medical rates are developed specifically in the covid-19 world ---"Dip Analysis" | TBD                 | Open        |
| Market Medical & Group Insurance                              | Lawley                   | Review and market lines of coverage (Medical, Dental, Vision, Disability and Life) to appropriate carriers and TPA's.                                               | 08/24/20            | Open        |
| Deliver 2021 Renewal / Marketing Results                      | Lawley                   | Deliver 2021 renewal binder to Fisher Associates                                                                                                                    | 10/02/20            | Open        |
| Final Plan Decision                                           | Lawley/Fisher Associates | Decision for 2021 employee benefits finalized & information sent to Paylocity                                                                                       | 10/12/20            | Open        |

|                          |                          |                                                                                                         |                     |      |
|--------------------------|--------------------------|---------------------------------------------------------------------------------------------------------|---------------------|------|
| Open Enrollment Strategy | Lawley/Fisher Associates | Discuss and plan OE meetings & materials needed-- <b><i>Virtual Open Enrollment Landing Page</i></b>    | 10/12/20            | Open |
| Open Enrollment Meetings | Lawley/Fisher Associates | Conduct Employee Meetings (in person or virtual utilizing <b><i>Lawley's virtual capabilities</i></b> ) | 11/2/2020 - 11/6/20 | Open |
| Benefits Renew           | Lawley                   | All plans renew                                                                                         | 01/01/21            | Open |
|                          |                          |                                                                                                         |                     |      |