



## Who's Here Today



**John Perry**  
**Vice President**

Relationship Manager

John devotes his time to establishing customized solutions for the large employer market. His expertise is focused on non-medical solutions: absence management, disability, life, executive benefits, supplemental health, dental, and vision. John is a Board Director for Apex Youth Connection in Biddeford, ME and enjoys watching his daughters, Lucy and Annie, swim competitively.



**Tom Coyne**  
**Senior Vice President**

Relationship Manager

Tom is a 30-year seasoned veteran in the Employee Benefits Industry. He has extensive knowledge in Absence Management, Ancillary Products, and Voluntary Benefits. He grew up on Munjoy Hill in Portland, is a graduate of Portland High School, and USM. His favorite part of any day is spending time with dog Cooper.



**Stephanie Miller**  
**Vice President**

Relationship Manager

Stephanie serves as a Relationship Manager to her clients and ensures that they receive impeccable service. She has a broad background in employee benefits, HR technology, and client advocacy. When Stephanie isn't at work, you can find her on a lacrosse field cheering for her son or riding her Peloton. She currently resides in Yarmouth with her two sons, Aidan and Camden as well as two dogs, Ashley and RuPaul.



**Catherine Desrochers**  
**Vice President**

Day-to-Day Consultant

Catherine thrives on building strong customer relationships and her areas of expertise include benefit plan evaluation and innovative plan design, analysis of funding arrangements, vendor negotiations and development of employee engagement strategies. Catherine lives on a small lake in Falmouth, ME with her husband and 2 very active kids! She loves numerous outdoor activities for all seasons, running and kickboxing.



**Jon Dahms**  
**Account Manager**

Day-to-Day Service

Jon provides day-to-day support to clients for all employee benefit plans. Jon works closely with clients to carry out strategies, implement solutions and to ensure resources are provided to support employees and employer compliance responsibilities. Prior to joining Alliant in 2020, Jon worked in Human Resources for a local long-term care facility for over 7 years and brings a unique perspective to his role. Jon is a native Mainer, having grown up in Gorham and attended Saint Joseph's College of Maine where he played baseball. In his free time, Jon enjoys spending time with friends, the outdoors and the seemingly impossible task of improving his golf game.



# We Really Are Different

Alliant Employee Benefits is the most progressive broker in the industry. Our unrivaled forward-thinking and depth of knowledge help our clients rapidly adapt to change and ensure every dollar they spend drives outcomes that matter.

We call this approach **Creative Agility.**

51%

Alliant employees

49%

Institutional investors

\$3.3B+

In revenue

\$30.7B+

In premium\*

9,700+

Employees

Offices  
Nationwide

 Employee Benefits Consulting	 Global Benefits Consulting	 HR Consulting
<ul style="list-style-type: none"><li>• Strategic planning</li><li>• Actuarial support</li><li>• Analytics &amp; informatics</li><li>• Benchmarking</li><li>• Legal/compliance support</li><li>• Open enrollment &amp; communications support</li><li>• Voluntary benefits</li><li>• Life &amp; disability consulting</li><li>• Absence management</li><li>• Health &amp; productivity</li><li>• Pharmacy benefit management</li><li>• Stop loss services</li><li>• Captive solutions</li><li>• Mergers &amp; acquisitions</li><li>• Benefits administration</li><li>• Vendor management &amp; negotiation</li><li>• Renewal management</li><li>• Issue resolution</li><li>• Extension of HR</li><li>• Value-based healthcare solutions</li></ul>	<ul style="list-style-type: none"><li>• Global benefits management</li><li>• Country &amp; industry benchmarking</li><li>• New country expansion</li><li>• M&amp;A due diligence</li><li>• Cost analytics</li><li>• Global mobility</li><li>• Global benefits website/app (benefit inventory)</li><li>• Insight into benefit spend consolidated into a single currency</li><li>• Renewal calendar</li><li>• Benefit details by country</li><li>• Total employee benefit cost analytics</li><li>• Single point of contact for client</li><li>• Local country brokers/consultants</li><li>• Connectivity with alliant domestic team</li></ul>	<ul style="list-style-type: none"><li>• Managed services (outsourced HR professionals)</li><li>• Compensation &amp; total reward consulting</li><li>• Executive compensation</li><li>• Incentive compensation</li><li>• Equity compensation</li><li>• Shared services</li><li>• Leadership development &amp; coaching</li><li>• Change management</li><li>• Project management</li><li>• Training</li><li>• Strategic planning</li><li>• Payroll</li><li>• Recruiting</li></ul>



## Entrepreneurialism

We think like our clients and deliver accordingly.

## Service

We are an extension of our clients' business.

## People

We invest in our team, share our resources, and inspire excellence.

## Relationships

We build and cultivate long-term relationships based on trusts, integrity, and results.



### HR Workplace Services

- HR Q&A support
- Handbook review
- Handbook creation
- Non-discrimination testing
- Learning management system & trainings
- HR educational videos
- Sample policies, checklists, workplace posters
- Weekly legislative updates
- Compliance calendar
- Secure/tracked document distribution & more



### Retirement Plan Consulting

- 401(k), 403(b), defined benefit, & non-qualified deferred compensation
- Plan design
- Investment review & management
- Vendor selection
- Communications & education
- Fiduciary responsibility guidance
- Compliance
- Administration
- Assist with day-to-day functions throughout the year
- Plan management & benchmarking
- Financial wellness & retirement readiness



### Property & Casualty

- Tailored service planning
- Losses, exposures, and controls
- Recommendations for improvement
- Workers' compensation
- Fleet safety
- Property
- General & product liability
- Consultant-led classroom instruction
- Webinars
- Newsletters
- Safety library
- Online learning management system
- Certificate of insurance tracking
- Incidence tracking
- Audit tracking
- Extension of your team



### HR Technology Consulting

- Review of current solutions
- Discuss system issues/needs
- Look at future needs
- Propose potential solutions
- System utilization reviews
- Facilitate issues resolution
- Utilize or cancel unused modules
- Contract & pricing review
- Formal & informal vendor selection
- Contract & SLA negotiations
- Implementation oversight & client advocacy
- Full implementation project management
- Post-go-live support