



SANTA ROSA COUNTY BOARD OF COMMISSIONERS

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JAYNE BELL, OMB Director

Memorandum

To: Santa Rosa County Board of Commissioners

From: DeVann Cook, Director, Human Resources

Through: Tony Gomillion, County Administrator

Re: Voluntary Benefit Programs

Date: September 28, 2016

RECOMMENDATIONS

1. Approve Primerica for payroll deduction status.
2. Submit request by Boston Mutual Life Insurance to Employee Benefit Group for consideration.

BACKGROUND

1. The Employee Benefit Group has recommended adding Primerica Financial Services, represented by Margarita Vazquez, to our list of voluntary benefit vendors. Primerica offers education and financial planning options for employees. Ms. Vazquez has many employees that are already clients and this would give them a payroll deduction option for participating in her program(s). Primerica would also be allowed to add clients, under the same guidelines followed by other investing organizations.
2. Boston Mutual Life Insurance, in cooperation with the Florida Association of Counties, offers a Guaranteed Issue – Whole Life insurance program for County employees. I recommend submitting this offer to the Employee Benefit Group and have them meet with Boston Mutual representatives in early 2017. If they recommend adding this product to our voluntary benefits lineup, the Board would be asked to approve this addition. If approved, Boston Mutual would be allowed to participate in the Open Enrollment process in August, 2017. As with all benefit vendors, they would only be allowed to hold voluntary group meetings and could only enroll during our Open Enrollment period.