1. **What goals would you like to achieve through your LSA?** Customizing your account to meet your organization's and employees' needs is the first step. **Check the items on the list you plan to include in your LSA:**

Physical Wellness:

- [ ] Gym/Fitness Club Memberships
- [ ] Health Club & Spa Memberships
- [ ] Rock Climbing costs
- [ ] Athletic/Gym equipment & accessories
- [ ] Martial Arts expenses
- [ ] Fitness Classes (Spin/Cycle, Yoga, Zumba, etc.)
- [ ] Swimming, Tennis, or any other sports activity lessons
- [ ] Nutritional Supplements
- [ ] Nutritional Counseling
- [ ] Personal Trainer
- [ ] Fees for Marathons, Sports Leagues, Etc.)
- [ ] Fitness Trackers
- [ ] Weight-loss Programs
- [ ] Other:

Financial Wellness:

- [ ] ID Theft Expenses
- [ ] Financial Planning & Advisory
- [ ] Student Loan Reimbursement
- [ ] Financial Seminars/Classes
- [ ] Home Purchase Expenses (down payment, closing costs, etc.)
- [ ] Wills & Trusts
- [ ] Remote Working Expenses: Internet, utilities, office furniture, supplies
- [ ] Charitable Donations
- [ ] Rent Assistance (amenity fees, etc)
- [ ] Other:

Emotional Wellness:

- [ ] Therapy
- [ ] Counseling (spiritual, marriage, etc)
- [ ] Hunting License
- [ ] Fishing License
- [ ] Camping Expenses(equipment, fees, etc.)
- [ ] Pet Insurance
- [ ] Pet Care (walking, grooming, general care, etc.)
- [ ] Personal development classes:
  - [ ] Cooking
  - [ ] Art
  - [ ] Carpentry
  - [ ] Trades
  - [ ] Other: (see additional Notes)
- [ ] Retreats (leadership, spiritual, etc.)
- [ ] Other:

2. How would you like to set up the account? In addition to the flexibility of coverage items, another detail that sets an LSA apart from other benefit options is that the employer can customize the amount(s) and to whom it's offered:

Who will have access to the LSA?

- ☐ All employees (common for most accounts)
- ☐ Other:

How much will be contributed to the account?

The employer can choose the amount they would like to contribute:

When do you want the funds to be available?

- ☐ Annually
- ☐ Bi-annually
- ☐ Quarterly
- ☐ Monthly
- ☐ Other:

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3. Contact our team for a quote or account set up. Our sales team is available to help with the next steps, whether answering questions, providing a quote, or setting up your account. You can reach out to your current sales rep or use the proposal link. If you are a broker planning an account for a client, you'll need this information for the proposal:

Employer Company:

State:

Number of eligible employees:

Plan Start Date:

Additional LSA resources can be found in our Open Enrollment Resources Center and on our website. For a list of FAQs, see the LSA Ultimate Guide.