

# 2027 **EMPLOYEE** **BENEFITS**

## PLANNING CHECKLIST



**A quick review to help you make informed decisions about your benefits program for the year ahead.**

### **1. Review Your Current Costs**

- ☐ Do you know your total annual benefits investment?
- ☐ Have you reviewed anticipated renewal increases?
- ☐ Are employer and employee contributions still manageable?

### **2. Evaluate Your Workforce**

- ☐ Has your employee count or workforce makeup changed?
- ☐ Are your current benefits meeting employees' needs?
- ☐ Are your benefits helping you attract and retain employees?

### **3. Explore Your Options**

- ☐ Have you compared alternative plans or coverage options?
- ☐ Could changes to plan design help manage costs?
- ☐ Are there benefits you're offering that employees aren't using or understanding?

### **4. Prepare for Enrollment**

- ☐ Do you know your renewal and enrollment deadlines?
- ☐ Do employees understand their available benefits?
- ☐ Do you have a plan to communicate changes clearly?

### **YOUR NEXT STEP**

If you couldn't confidently check every box, you may have identified an area worth reviewing before your next renewal.

### **I'm Here to Help.**

Planning for 2027 doesn't have to be complicated. If you have questions about your current benefits program or want to explore your options, I'm happy to help you make informed decisions for the year ahead.



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