

GUIDED ENROLLMENT

Summit Sherpa™

Step-by-step guidance that helps you choose the coverage that actually fits your life.

Most people don't re-evaluate their benefits every year — they just re-pick what they had, even when their life has changed. Summit Sherpa walks employees through enrollment the way a knowledgeable friend would: asking about their actual situation first, then narrowing down the plan that fits it, instead of handing over a stack of plan documents and hoping for the best.

HOW SHERPA GUIDES YOU

Tell Us About You	A few quick questions about your household, health needs, and budget.
See Options Side-by-Side	Plans compared in plain language, not a wall of coverage tiers and codes.
Get a Recommendation	A suggested fit based on your answers — not the most expensive plan.
Confirm & Enroll	Review your choice and submit, with help still available if something changes.

QUESTIONS SHERPA HELPS YOU ANSWER

Which Medical Plan Fits?

Based on how often you and your family actually use care.

Do I Need More Life Insurance?

A plain-language look at coverage relative to your situation.

Should I Add Dental or Vision?

Weighing the cost against how likely you are to use it.

What Changed Since Last Year?

A quick flag on anything different from your prior elections.

WHY IT'S DIFFERENT

- ☐ Based on **your actual situation**, not generic plan descriptions
- ☐ Available **during the real enrollment window** — not a one-time seminar
- ☐ Reduces **default and last-minute** no-decision enrollments
- ☐ Never replaces your judgment — it's guidance, not a mandate

Sherpa provides educational guidance to support your decision. It does not constitute personalized financial, tax, or legal advice.