2020 Annual Enrollment Checklist

PRINT THIS PAGE AND CHECK OFF EACH ITEM AS YOU GO.

Use this checklist to ensure you have all the information you need before enrolling or making changes to your benefits. Remember, you must enroll by logging in to BI Benefits Direct through the Total Rewards Portal>Quick Links.

☑ **Check each item as you complete the checklist**

Will you be covering a spouse/domestic partner and/or dependents?

If yes, make note of their: ☐ Date of birth ☐ Social Security number

Benefit Plans:

☐ **MEDICAL**
- ○ Aetna HealthFund HSA Plan
- ○ Aetna Whole Health CT HSA Plan*
  - *available only to BIPI/BIUSA employees living in CT
- ○ Aetna HealthFund HRA Plan
- ○ Aetna Choice POS II Plan
- ○ BIFI Site Only: Kaiser
- ○ PR Only: Humana

☐ **DENTAL**

☐ **VISION**

☐ **LIFE INSURANCE**
- ○ Supplemental Term Life Insurance
  - ○ 1x to 7x Annual Base Salary: _____x
    (only if you are enrolling for the first time or making changes; you do not need to re-enroll each year)

- ○ Voluntary Dependent Term Life Insurance
  Spouse/Domestic Partner:
  - ○ $15,000
  - ○ $25,000
  - ○ $50,000

  Child(ren):
  - ○ $5,000
  - ○ $10,000

☐ **FLEXIBLE SPENDING ACCOUNTS**
- ○ Health Care FSA $_____/annually
  $2,700 maximum
  (not available to Aetna HSA Plan participants)
- ○ Limited Scope FSA $_____/annually
  $2,700 maximum
  (available only to Aetna HealthFund HSA & Aetna Whole Health CT HSA Plan participants)
- ○ Dependent Care FSA $_____/annually
  $5,000 maximum
  ($2,500 maximum if married and filing taxes separately)

☐ **HEALTH SAVINGS ACCOUNT**
$_____/annually
(available only to Aetna HealthFund HSA & Aetna Whole Health CT HSA Plan participant, up to IRS limits)

☐ **VOLUNTARY BENEFITS**
- ○ Allstate Accident Insurance
- ○ ARAG Group Legal
- ○ Pet Care Discount
- ○ MetLife Auto & Home Insurance