

# Scalable Solutions: How Benetech Expanded Their Business as a Vestwell Flex Partner

TPA

“Our consultants are experienced in explaining the rules around retirement plans in plain English,” explained Phil Dabney, Vice President of Sales and Marketing at Benetech. “We leave out the jargon.”

**Benetech, a third-party administrator (TPA), timed their entry into the market perfectly.**

The firm was established in 1974—the same year the Employee Retirement Income Security Act (ERISA) went into effect. Benetech’s objective was to help employers navigate the complexities introduced by this new law. As part of their ongoing efforts to offer a seamless retirement benefit—regardless of size or complexity, the firm partnered with Vestwell, a modern savings platform building a suite of retirement, health, and education solutions.

**The partnership has enabled Benetech to deliver a distinctly streamlined client experience as part of the Vestwell Flex program.**

## The Challenge: Bridging the TPA-Recordkeeper Communication Gap

One of Benetech’s biggest challenges when working with recordkeepers was inefficient communication. **Inefficient communication creates critical delays, leaving Benetech and their clients waiting days—or even weeks—for a response.**

“With some recordkeepers, it's not always clear who to contact for answers and how to escalate a client's concern so that it's resolved quickly.” Phil explained that what Benetech values most is having clear lines of communication with their recordkeeper partners so that they can get timely answers and deliver a seamless client experience.

Phil also emphasized the importance of integrated operations between the recordkeeper and the TPA, noting that a disjointed approach could complicate the administration process and jeopardize client satisfaction. **Phil believed that by bridging the communication gap, Vestwell's Flex solution would allow Benetech to provide an exceptional client experience and scale their business.**

## The Solution: Operational Ease With Vestwell Flex

Benetech joined forces with Vestwell to become a [Flex partner](#). The firm leverages Vestwell's consolidated pricing model, extensive payroll integrations, and open communication to offer their clients a seamless experience.

"From the beginning of our discussions to become a Flex partner, it was clear that **Vestwell is committed to having a collaborative relationship with their TPA partners.**"

Phil Dabney, Vice President of Sales and Marketing, Benetech

## Consolidated Pricing and Agreements

**Vestwell Flex's simplified pricing and billing model streamlines the sales and onboarding process for Benetech and their clients.** “During the sales process, it's often unclear to potential clients that the TPA and the recordkeeper each have separate fees,” Phil explained. “By integrating Benetech's fees into the Vestwell Flex fees, we can disclose the total cost. It also shows a clear partnership, making it a more seamless process when presenting the proposal to a prospective client.”

## Extensive Payroll Integrations

Vestwell's capabilities support 100+ [payroll integrations](#), which streamline plan administration for Benetech's clients and make the retirement plan management process smoother and more efficient overall. Because information is automatically transferred between systems, payroll integrations save time on the backend and help minimize the risk of errors. **"Vestwell's commitment to integration with payroll companies stands out," Phil said.** "Vestwell's dedicated resources allow a seamless transition to Vestwell Flex from other 401(k) providers"

## A Commitment to Collaboration

Phil also highlighted Vestwell's commitment to maintaining open and consistent communication with their TPAs at all stages of the partnership, including marketing, sales, client onboarding, and ongoing administration. He appreciates that Vestwell's TPA management team actively works to identify and implement improvements in their relationships with their TPA partners to enhance their collaboration and service delivery.

**"The open communication from Vestwell allows us to make the client experience seamless."**

**Phil Dabney**, Vice President of Sales and Marketing, Benetech

## The Impact: A Cohesive Client Experience at Scale

**Vestwell Flex offers a "bundled" feel and a cohesive experience for Benetech's clients.**

This unified TPA-recordkeeper approach simplifies plan management, ensuring that clients can navigate the complexities of ERISA, as well as newer legislation, such as the SECURE Act and the [SECURE Act 2.0](#), with ease and clarity.

Plus, Vestwell's advanced technology and robust payroll integrations automate routine tasks, allowing Benetech to lean into their core competencies and focus on finding solutions for the businesses they serve. This enables the firm to scale their operations effectively and increase sales in their core distribution channels without additional complexity or overhead.

## Conclusion

Through consolidated pricing and agreements, robust payroll integrations, and open communication, Vestwell Flex has enabled Benetech to provide a more scalable and client-friendly service. Plus, by strengthening the distribution channels for Benetech, Flex allows for more visibility and increased sales opportunities.

**TPAs can elevate their offering and accelerate their growth by partnering with Vestwell, a modern savings platform building a suite of solutions across retirement, health, and education.** Contact us to learn how we can help you make a lasting impact on your clients' financial futures.

Click [here](#) to book a demo with Vestwell.

Click [here](#) to learn more about Benetech.



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