

Weekly Team Training - February 24

Meeting Purpose

[Weekly team training on Capstone program implementation process and upcoming program enhancements.](#)

Key Takeaways

- [Detailed walkthrough of Capstone program implementation process, from paperwork to payroll integration](#)
- [Major program enhancements coming March 1st, including new app, expanded prescription coverage, and additional benefits](#)
- [Agency partnering with Chris Gaddis to offer broader financial services training/resources beyond just Capstone](#)

Topics

Capstone Implementation Process

- [Three integration types based on company size:](#)
 - [Self-portal \(small companies ~90 employees\)](#)
 - [Census-to-census \(100-300 employees\)](#)
 - [API integration \(very large groups\)](#)
- [45-60 day implementation timeline from paperwork to go-live](#)
- [Key steps: Kickoff call, education campaign, mock payroll, practice payroll, live payroll](#)
- [All enrollments done on opt-out basis; 2-week opt-out window after education phase](#)
- [Commissions paid monthly, typically around 25th, for previous month's activations](#)

Support Team Structure

- [Amaze \(8+ years\): Employee education, telehealth \(being phased out\)](#)
- [Capital Group \(35+ years\): Enrollments, payroll, funding transfers](#)
- [Capstone: ~100 employees, 60 dedicated to program](#)

Upcoming Program Enhancements (March 1st)

- [New Capstone-developed app replacing Amaze](#)
- [New telehealth provider \(VA hospital/veteran provider\)](#)
- [Expanded prescription coverage \(800-2000 medications at no cost vs. current 50\)](#)
- [Added benefits: Virtual vet for pets, additional lab work coverage](#)
- [No changes to core indemnity plan or agent compensation](#)

Agency Expansion Plans

- [Partnering with Chris Gaddis \(RIA\) to offer broader financial services training](#)
- [New Tuesday 3pm ET call being added \(start date TBD\)](#)
- [Access to expanded product/training materials beyond just Capstone](#)
- [Potential high-profile endorsements \(RFK Jr. cabinet member, SHRM\)](#)

Next Steps

- [Continue presenting current program until new slide deck available \(likely by March 1st\)](#)
- [Remove specific "Amaze" references, speak generally about telehealth benefits](#)
- [Mention prescription program enhancement coming soon without specifics](#)
- [Watch for updates on new materials/training schedule](#)

Action Items

- **Upload Module 1 to Tax Saver Today back office - [WATCH \(5 secs\)](#)**
- **Upload Module 2 to Tax Saver Today back office - [WATCH \(5 secs\)](#)**