

INTERNATIONAL RETIREMENT AND SAVINGS PLAN

CASE STUDY 1

A WORLD *of* DIFFERENCE

utmost[™]
CORPORATE SOLUTIONS

PROFILE

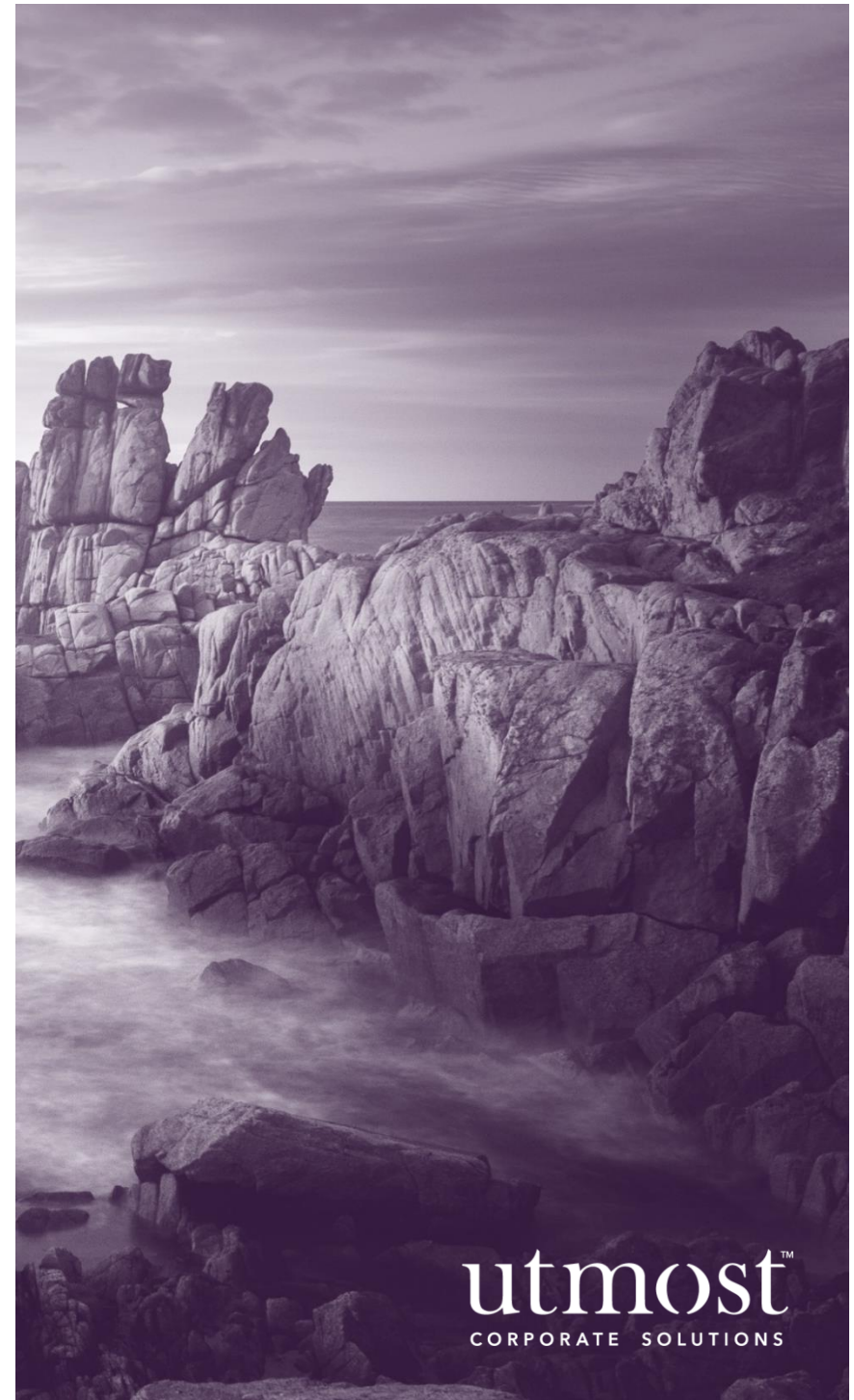
Non-Governmental Organisation
(NGO) - Global Strategy

CIRCUMSTANCES

Employees - International Mobile
Employees (IME) and Global Local
Staff

AIM

Global Benefit Strategy - for all
employees



PROFILE

NON-GOVERNMENT ORGANISATION(NGO) - GLOBAL STRATEGY

This organisation has its Headquarters in USA However, it has extensive global footprint that covers Asia Pacific, Latin America and Africa.

CIRCUMSTANCES

EMPLOYEES - INTERNATIONAL MOBILE EMPLOYEES (IME) AND GLOBAL LOCAL STAFF

The Human Resource Director was keen to implement a consistent global benefit strategy for their employees but was struggling to find a solution for their Internationally Mobile Employees (IME) population and for some of their country office local staff. The Human Resource team also wanted a simple and efficient to administer solution.

AIM

- Same businessmodel
 - Portability for mobile employees.
 - Ability to operate across different international locations.
 - Provide a consistent benefit for their IME and also their country office staff.
 - Flexible to accommodate the two different populations and benefits required.
 - Empowerment for the Regional Human Resource office(s) to administer their plans direct.
 - Transparency and ease of access to information on a Global, Regional, Country and member level.
 - Efficient and cost effective
 - Wanted an Account Executive to help and support the team
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SOLUTION

Utmost Corporate Solutions provided one global plan that could be split out by region and country. This allows the organisation to decide at which level decisions can be made: at headquarters, regional or country level.

The organisation decided it would have 1 set of benefits for the IME's and 1 set of benefits for their local national employees.



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SOLUTION

REGIONAL

The organisation has a large Asia Pacific regional office with its own Human Resource team.

Headquarters decided to empower the regional Human Resource office to administer their plan directly with Utmost Corporate Solutions. Therefore, an Asia Pacific plan was created with separate sub-plans for each country and Utmost Corporate Solutions now works with the regional office and accepts contributions via regional payroll and applies them into each country office's sub-plan.



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CENTRAL

As there is no regional hub for the Latin American or African country offices, it was decided that, within the global plan, these would be dealt with centrally at Headquarters.

Each country office now has a sub-plan with their employee accounts held separately, however, Utmost Corporate Solutions deals with Headquarters and receives the US Dollar contributions centrally.



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ACCOUNT SUPPORT AND ACCESS TO INFORMATION

Utmost Corporate Solutions provided the organisation with a dedicated Account Executive who provides support, training and engagement to Human Resources and the employee population.

As well as providing support material including a co-branded employee booklet that includes photos owned by the Organisation to help employees engage.

Utmost Corporate Solution's secure Online Service Centre provides 24/7 access to plan information and data for both Human Resources and employees, enabling Human Resource at headquarters to view the plan information on a global, regional, country and member level.

The Asia Pacific regional HR are able to view their region and country level information. The employees can view their accounts using a range of devices – this allows them to be more connected to their benefit and makes them feel valued.



SAME TEAM,
SAME PRODUCTS,
SAME SPECIALIST EXPERTISE,
SAME COMMITMENT AND CARE
WITH A DISTINCT BRAND
THAT REFLECTS OUR UNIQUE
APPROACH AND THE WORLD
OF DIFFERENCE WE MAKE FOR
OUR CLIENTS AND PARTNERS