



Small to
Mid-Market

Broker Success Tool Kit

Build your business faster with
our comprehensive suite of
products and services.





How We're Different

At Amwins Benefits | Small to Mid-Market, we bring clarity to complexity, speed to strategy, and confidence to every decision. With national scale and local insight, we deliver smarter solutions, stronger relationships, and seamless support—from quoting to renewal and everything in between.

“Our mission is clear: to be the firm brokers trust to deliver the best client experience and build the future of their businesses.”



Adam Mathis, President
Amwins Benefits | Small to Mid-Market



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Quick Start Guide

Get Sales and Client Support

Your local [Regional Sales Manager](#) and their team offer targeted client support and sales strategies. The [Sales Solution Center](#) also offers key resources.

Streamline Your Processes

- Quote Seamlessly with [Benefix](#).
- Simplify Benefits Administration with [Seamless BenAdmin Tools and Support](#).
- Access the [Carrier Commissions](#) & Appointment Guide.
- Access [Forms and Benefits](#).
- Digitize paper applications with [DigiOne](#).

Access Comprehensive Products & Services

As part of Amwins Benefits | Small to Mid-Market, brokers have access to a full suite of products and services to address Small and Midsize Group, Large Group, Level-Funded and Ancillary benefit needs. Reach out to your Regional Sales Representative for a comprehensive consultation and to learn more about the Amwins Benefits experience!

- Browse the [Carriers](#).
- Review the [Product Guide](#) to states and carriers.
- Compare Health Plans: Filter and compare with the [Master Carrier Guide](#).
- Offer Value-Added Services: The [Amwins Connect Storefront](#) features our trusted partner solutions for HR, ACA compliance, payroll services, and financial wellness.

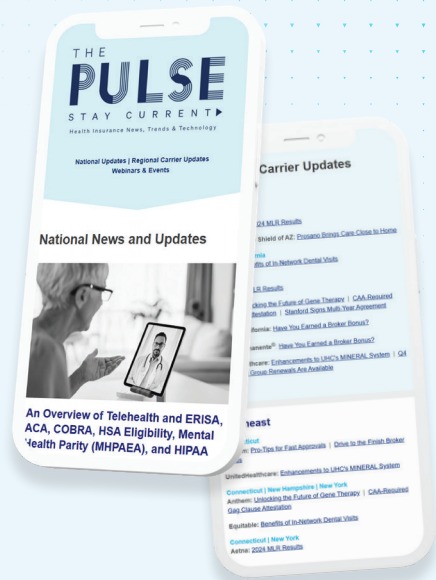
✓ Stay Ahead of the Market

Your clients count on you as their trusted advisor. We help you stay on top of compliance changes and industry trends.

- Compliance Alerts: [The Compliance Digest](#)
- Executive Insights: [Coffee With Carriers](#) videos and the [ConnectCast](#) podcast.
- Market and Carrier Updates: [The Pulse newsletter](#)
- Essential Webinars: [Products, carriers, and sales strategies](#)

✓ Get Rewarded

The moment a broker signs on with Amwins Benefits | Small to Mid-Market, production is tracked toward one of the most exclusive experiences in the industry: the **Star Broker Summit**. The Summit brings top brokers together at a luxury resort to connect, learn, grow, and get inspired.



▶ Subscribe to the Pulse Newsletter!

The Pulse is your weekly insider pass to the latest industry trends, carrier updates, and can't-miss events.

[Subscribe today!](#)

Sales Solutions

Amwins Benefits | Small to Mid-Market helps you build your business faster, with local professionals who understand your market, a consultative approach that puts your clients first, and a dedicated team that supports you from quote to card:



Sales: Local reps with deep market knowledge and a consultative mindset



Quoting: Accurate quotes drive success. Offer clients clear, data-driven options quickly. Large group, small and midsize group, level-funded, or ancillary—we have you covered.



Enrollment: Virtual/in-person support, platform builds, and collateral



Underwriting: Get best-in-class support, backed by local carrier relationships. Our clean case submission rate is 92%—compared to the industry average of 34%. We negotiate competitive rates and terms.



Renewals: Quickly contrast and compare best options.



Value Adds: HR to Compliance, choose from vetted partners.

Your local **Regional Sales Manager** and their team offer targeted client support and sales strategies. The **Sales Solution Center** also offers key resources.





Quoting

Our **quoting services and technology** build trust, win business, and keep clients coming back.



Small and Midsize Group Access

We simplify small and midsize group quoting through Benefix and the Master Carrier Guide. Brokers can quote medical, ancillary, and voluntary benefits in one place—cutting paperwork, reducing data entry, and saving time.



Large Group Expertise

We support every step of the large group RFP process. We offer quoting support, underwriting, rate negotiation, and exclusive deliverables like cost/benefit spreadsheets and enrollment booklets.



Quote to Enroll with Benefix

Benefix allows brokers to:

- Instantly quote across multiple carriers
- Eliminate paper and duplicate data entry
- Access plan documents, rate grids, and Smart Renewal quotes



Level-Funded Solutions

Brokers can quote level-funded plans that combine the cost control of self-funding with the simplicity of fully insured options.



MEC, GAP, and Voluntary Benefits

We provide quoting access to MEC, GAP, and voluntary benefit plans to build compliant, budget-conscious packages tailored to client needs.



Custom Spreadsheets

Our pre-underwriting support includes custom spreadsheets that compare plan designs, rates, and funding strategies—making it easier for brokers and clients to evaluate options.



We are a full service General Agency with support throughout the entire sales cycle—from quoting, enrollment, renewals, and ongoing group and member escalations. Our local market intelligence and sales support teams are here to help brokers grow and maintain their book of business.”



Austin Scott

SENIOR VICE PRESIDENT, SALES

AMWINS BENEFITS | SMALL TO MID-MARKET



► Stay Ahead with the Latest Compliance Digest

Our quarterly publication is your reliable resource to navigate the ever-changing regulatory landscape.

[Download the latest Compliance Digest](#)

Renewals

Renewals are the broker's proving ground. It's where trust is reinforced, value is demonstrated, and smarter coverage takes shape. With Amwins Benefits | Small to Mid-Market behind you, it's not just about keeping business—it's about building momentum.



Support Renewal Market Check

Amwins Benefits | Small to Mid-Market simplifies the renewal process by handling carrier outreach, gathering renewal data, and conducting comprehensive market checks. You get side-by-side comparisons of plan options—saving time and ensuring clients get competitive solutions.



Consult & Offer More

A renewal is a key opportunity to revisit client needs. We'll help you identify additional opportunities, such as adding voluntary benefits. We'll help you grow your book of business while enhancing client value.



Strategic Planning

We help you meet your client's long-term goals with benefit strategy discussions, tailored recommendations, and early renewal notifications.

Underwriting/New Business

With Amwins, you're not just presenting options—you're fostering confidence. And that's what clients remember. Our professional team offers full-service support from quote to enrollment. Our strong carrier ties enhance the underwriting experience.



Exceptional Support

Amwins Benefits | Small to Mid-Market brings you a full-service underwriting experience that includes pre-underwriting consultation, quoting assistance, and enrollment coordination. We support small and large group submissions, ensuring accuracy, speed, and alignment with your client's goals. Our clean case submission rate of 92%—compared to the industry average of 34%—means a smoother experience from quote to card so your clients have access to care.



Local Carrier Relationships

Amwins Benefits | Small to Mid-Market has deep-rooted relationships across regional and national carriers. So, we can negotiate effectively, resolve issues quickly, and deliver tailored solutions geared to the local market.



Tenure & Expertise

Our underwriting team brings years of experience and market insight to every case. Their tenure translates into faster turnaround times, accuracy, and strategic plan recommendations—helping you win and retain business.



Your local Regional Sales Manager and their team offer targeted client support.



The Amwins Benefits | Small to Mid-Market experience is defined by deep specialization, strong market relationships, and a client-first approach. With a broad range of solutions, we deliver tailored coverage through industry expertise, innovative tools, and an unwavering commitment to helping brokers succeed in a complex market.”



Jack Lyons

SENIOR VICE PRESIDENT, SALES

AMWINS BENEFITS | SMALL TO MID-MARKET

Comprehensive Enrollment Support



Enrollment is the first step in delivering value to your clients—and at Amwins Benefits | Small to Mid-Market, we make it seamless. From digital tools to personalized support, our enrollment services simplify the process for brokers, employers, and employees alike.



Enrollment Collateral

We bring you professionally designed, customizable enrollment materials for virtual and in-person presentations. These include benefit summaries, plan comparisons, and branded collateral to help you communicate value to your clients and their employees.



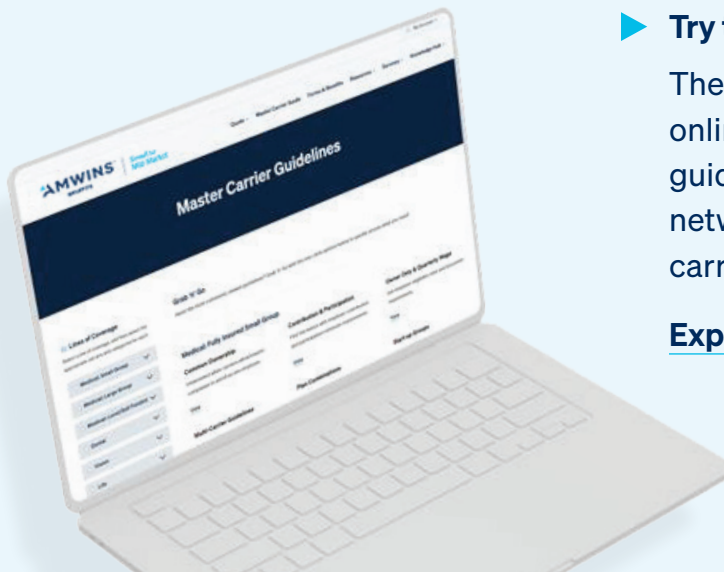
Virtual & In-Person Enrollment

Whether enrollment is happening online or face-to-face, Amwins Benefits | Small to Mid-Market supports brokers with flexible delivery options. Your team can assist with scheduling, logistics, and execution to ensure a smooth experience for all participants.



BenAdmin Support

We offer full-service support for Ease and Employee Navigator platforms. Our team builds broker groups within each system to streamline setup and maximize efficiency.



▶ Try the Master Carrier Guide

The Master Carrier Guide (MCG) is your online, always-updated resource for carrier guidelines. Check eligibility, compare networks, review enrollment rules, and filter carrier requirements.

[Explore the MCG](#)



Streamline Your Processes



Access the Carrier Commissions & Appointment Guide

The guide will help you stay compliant and get appointed quickly. It offers:

- Up-to-date commission structures
- Carrier appointment requirements
- Easy access to forms and instructions



Access Forms and Benefits

AmwinsConnect.com hosts a library of:

- Carrier forms and applications
- Product brochures and benefit summaries
- Downloadable and email-ready documents. This resource simplifies document management and ensures that you always have the latest materials at your fingertips.



Digitize paper applications with DigiONE™ Insurance Data Solution

DigiONE is Amwins Benefits | Small to Mid-Market's solution for digitizing paper applications:

- Instantly convert paper forms into digital submissions.
- Reduce errors and processing time.
- Support a smoother onboarding experience for clients.

Access Comprehensive Products + Services



As part of Amwins Benefits | Small to Mid-Market, brokers have access to a full suite of products and services to address Small and Midsize Group, Large Group, Level-Funded and Ancillary benefit needs. Reach out to your local Regional Sales Representative for a comprehensive consultation and to learn more!



Review Product Guide To States and Carriers

Our [regionalized product guide](#) outlines carrier availability and product offerings. Match your client's needs with the right carriers and plan types—whether fully insured, self-funded, or ancillary.

– Browse the [Carriers](#).



Compare Health Plans with the Master Carrier Guide

[The Master Carrier Guide \(MCG\)](#) is a mobile-friendly, online tool that allows you to filter and compare carrier rules, eligibility criteria, provider networks, enrollment



guidelines, and promotions. It includes cheat sheets for quick access to commonly referenced guidelines like DE9C, owner-only requirements, and split carrier rules. The MCG is continuously updated to bring you the most current information.



Explore Value-Added Services

The Amwins Benefits | Small to Mid-Market **Value Added Services** features our trusted partner solutions for HR, ACA compliance, payroll services, and financial wellness. We have partnered with industry leaders to offer a curated suite of value-added services through the Storefront:

- ACA compliance and benefits administration
- Payroll processing
- Financial wellness programs
- HR support tools

Total Support with Amwins Benefits



Amwins Benefits

Small to Mid-Market | Self-Funded | Ancillary | Exclusive Programs | Retiree Healthcare

The Amwins Benefits Division connects brokers to specialized teams and comprehensive products. Regardless of the need, we help you deliver solutions with confidence.

Small to Mid-Market

Amwins Benefits | Small to Mid-Market is a broker-focused general agency that connects every point of the benefits journey—delivering expert sales support, streamlined quoting and enrollment tools, and innovative technology so brokers can grow their business with confidence.

Self Funded

Amwins Benefits | Self-Funded partners with Producers to deliver comprehensive, flexible stop-loss solutions, combining industry-leading expertise, long-term carrier relationships, and a full suite of integrated services to protect your clients and strengthen your competitive edge.

Ancillary

Amwins Benefits | Ancillary delivers a comprehensive and competitive portfolio of high-value ancillary benefit solutions, supported by deep industry expertise, strong carrier relationships, and backed by the strength of Amwins.

Exclusive Programs

Amwins Benefits | Exclusive Programs is a specialty underwriter, distributor, and program manager of medical stop loss, fully insured medical, and other custom A&H products. The team provides underwriting excellence through a combination of specialized expertise across fully insured, self-funded, and custom programs. Amwins Benefits | Exclusive Programs has a proven track record of generating profitable and sustainable growth for our carrier and reinsurer partners.

Retiree Healthcare

Amwins Benefits | Retiree Healthcare partners with brokers to deliver sustainable, compliant, and cost-effective retiree healthcare strategies. With more than 30 years of experience and 700+ employer group clients nationwide, we help employers protect retiree benefits while guiding members through Medicare with clarity and confidence.

About Amwins

A Diversified Business Model

- Amwins Benefits: Fully insured, self-funded, ancillary, and exclusive programs.
- Property, casualty, and professional lines coverage for complex and unique risks.
- Nationwide binding platform for small commercial and personal lines businesses.
- In over 150 countries placing specialty insurance and reinsurance coverage.

To learn more, contact your [Regional Sales Manager](#).



Stay Ahead of the Market

Your clients rely on you as a trusted advisor—and Amwins Benefits | Small to Mid-Market helps you stay ahead with timely insights on compliance and industry trends.

- **The Compliance Digest**: Published quarterly, the Compliance Digest delivers curated updates on regulatory changes, legislative developments, and carrier-specific compliance responses. It's designed to help you navigate the evolving benefits landscape with confidence.
- **Executive Insights**: When you tune into **Coffee With Carriers** videos and the **ConnectCast** podcast, you get candid conversations with carrier executives and industry leaders. Anticipate trends and adapt your approach with insights on market shifts, product innovations, and sales opportunities.
- **Market and Carrier Updates: The Pulse newsletter** is your resource for staying current on what's happening in the benefits market. You get timely updates on carrier changes, product launches, and regional market dynamics.
- **Essential Webinars on products, carriers, and sales strategies**: Amwins Benefits | Small to Mid-Market hosts live and on-demand webinars covering everything from new carrier offerings to advanced sales techniques. These sessions will help you sharpen your skills and expand your product knowledge.

Earn Your Place at the Star Broker Summit

Arizona Biltmore Resort
Location of the 2026 Star Broker Summit



The moment a broker signs on with Amwins Benefits | Small to Mid-Market, the journey begins. From day one, we track your production to qualify for one of the industry's most exclusive experiences: the **Star Broker Summit**. It's a celebration of progress, trust, and performance for top producing brokers. Held at a luxury resort, the experience is designed to inspire. Enjoy first-class amenities and recreation, meaningful conversations, professional development sessions, and time to recharge in a stunning natural setting.

Brokers come together to connect, learn, and grow. It's where strategy meets sunshine, where insights are exchanged, and where the future of the business is shaped.

The Star Broker Summit is your opportunity to celebrate your success—and rise to the challenges ahead.





Small to
Mid-Market



Welcome!

This guidebook is a quick overview of how Amwins Benefits | Small to Mid-Market is working for you.

Get essential resources at [AmwinsConnect.com](https://www.amwinsconnect.com).

It's more than a website—it's your all-in-one launchpad for success.

