

PC26

Trustmark
Producer Conference
Nashville • February 1-4, 2026

AMPLIFY

Trustmark 

Cariloop: Going Above and Beyond for Caregivers



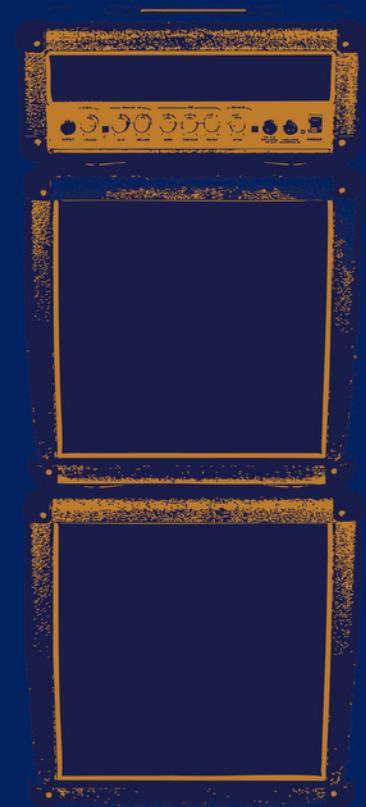
Michael Walsh
Founder & Chief Executive Officer
Cariloop



Adam Bezman
Executive Director, Product & Innovation
Trustmark Voluntary Benefits

Agenda

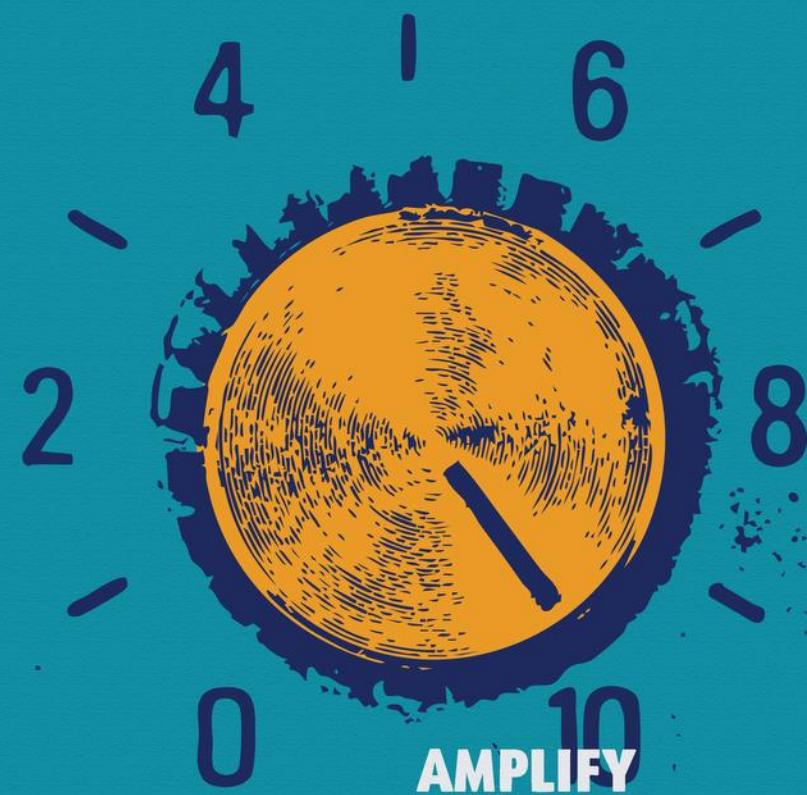
1. Today's Caregiving Landscape
2. What is Cariloop and How Can It Help?
3. How Cariloop Works With Trustmark Products
4. Real Cariloop Use Cases



“There are only four kinds of people in the world: those who have been caregivers, those who are currently caregivers, those who will be caregivers, and those who will need caregivers.”

- Rosalynn Carter

Former First Lady of the United States



The Caregiving Landscape

- 63 million Americans are family caregivers
- Increase of 47% in the past 10 years



63M

+47% in the last 10 years

Employee Caregivers

- Caregiving is costing employers over \$50 billion annually
- That's as much as they spend on corporate wellness programs



Voya, For the Benefit of All. 2024.

Cariloop Company Background

- Caregiver Support Company founded in 2012
- Based in Dallas, TX
- Serving 200+ corporate customers and >2 million of their employee caregivers
- Member and Customer NPS scores >+85
- PROUD partners of Trustmark!



What Does Cariloop Do?

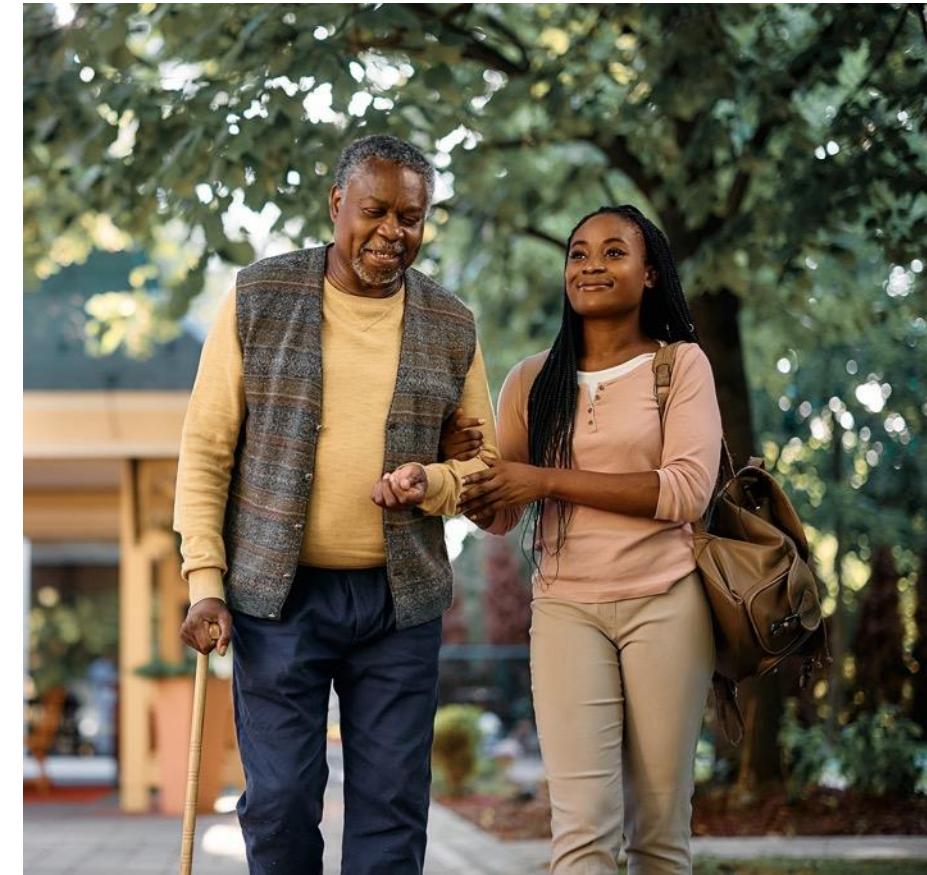
Cariloop's Caregiver Support Platform provides the professional coaching and digital tools needed to navigate all the complexities of caring for loved ones.

The image displays the Cariloop platform interface, showing both a desktop browser view and a mobile phone view. The desktop view shows a sidebar with navigation options like Home, Find Care, Toolkit (with sub-options like Support Plans, Medications, Providers, Notes, Documents, Planner, Care Team), Library, Coaching, and Backup Care. The main content area features a "We're here to help" section with a message from "Your Coach Linda Barrow, LMSW Certified" and a "Book a call" or "Message Linda" button. Below this is a "Your support plans" section with cards for "Childcare Coordination and Support" (Not started) and "Insurance Navigation Support" (In progress), along with a "Find a support plan" button. The mobile phone view is a smaller, vertically oriented version of the same interface, designed for mobile devices.

How Can Cariloop Help?

Cariloop delivers one-on-one support for working caregivers at all life stages, including planning for and managing the care of adults, aging loved ones, and even themselves.

- Assisted living & nursing homes
- Home Health
- Hospice & Palliative Care
- Memory Care
- Alzheimer's & Parkinson's
- Finding doctors or specialists
- Navigating chronic illness
- LGBTQ+ support
- Neurodiversity support
- Advanced directives
- Living wills
- Medicare & Medicaid
- VA benefits
- Transportation
- Difficult conversations
- Medication management
- Caregiver mental wellness
- And more...



Real Cariloop Scenario 1

How a Real Policyholder Might Use Cariloop

- **Situation:** Elderly family member transferred to rehab facility after had hip surgery
- **Issue:** Identifying an assisted living facility for a permanent stay
- **Solution:**
 - Cariloop Care Coach screened and recommended 4 facilities
 - Cariloop app provided questions to ask when visiting facilities
 - Cariloop researched how to apply for and access MediCal and Medicare
- Total Cariloop engagement time: 2 weeks

“Cariloop provided empathy, confidence, and peace of mind!”



Real Cariloop Scenario 2

How a Real Policyholder Might Use Cariloop

- **Situation:** Elderly family member needed in home care, physical therapy, and food delivered to the home
- **Issue:** Finding resources to meet the variety of care needs
- **Solution:**
 - 30-minute call with a Care Coach
 - Care Coach researched and interviewed all local providers and low/no cost food delivery options
 - Discussed insurance with local providers to understand care that would be covered
- Total Cariloop engagement time: 1 week

“If I knew about this 3 years ago, it would have put years on my life.”



Trustmark + Cariloop

Offer Details

- Available on all new Trustmark Universal Life, Trustmark Universal LifeEvents®, and Trustmark Life + Care® cases
- Includes 24/7 digital access for all Cariloop services and 1 month of coaching/year for elder care support
 - Access to licensed Care Coaches to help guide care decisions
- Discounted Cariloop rates available for broker partners/Trustmark customers interested in offering Cariloop on an employer-paid basis



Key Takeaways

- Trustmark and Cariloop are here to help you deliver a complete care solution
 - Go beyond helping protect employees from the financial challenges of long-term care
 - Cariloop helps fill in the gaps with care resources and support that policyholders and their families can use today
- Cariloop is effective on all new Trustmark Universal Life, Trustmark Universal LifeEvents®, and Trustmark Life + Care® cases

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Thank you!

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