

**PC26** Trustmark  
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Trustmark 



# Cariloop: Going Above and Beyond for Caregivers



**Michael Walsh**

Founder & Chief Executive Officer  
Cariloop

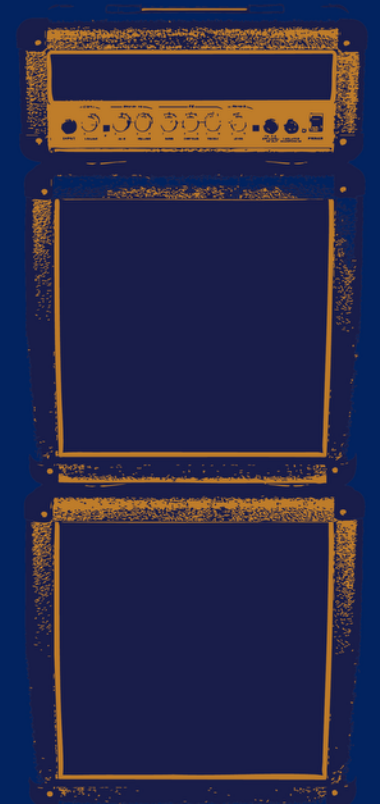


**Adam Bezman**

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

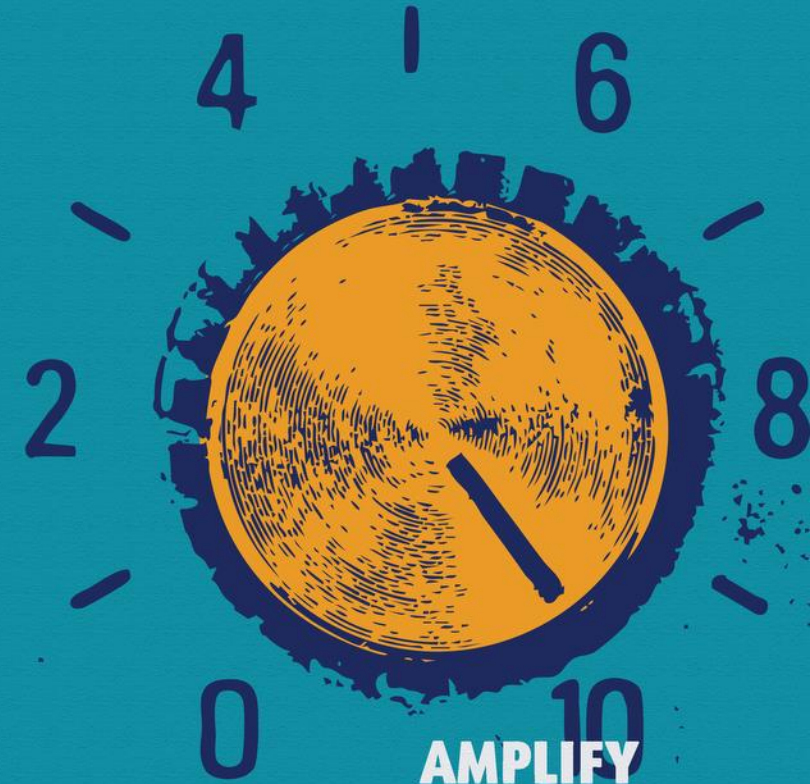


**AMPLIFY**

“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.*

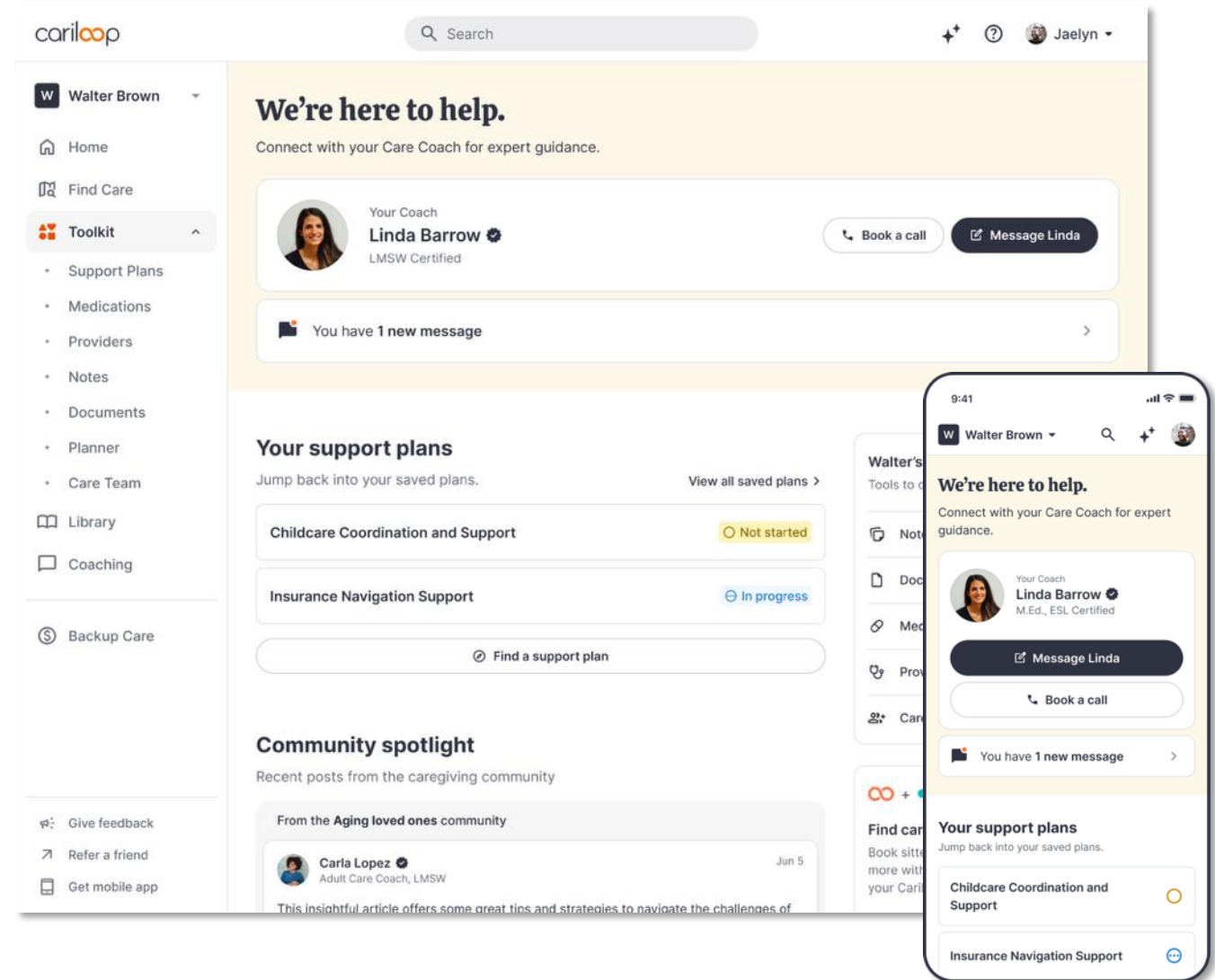
# Cariloop Company Background

- 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.

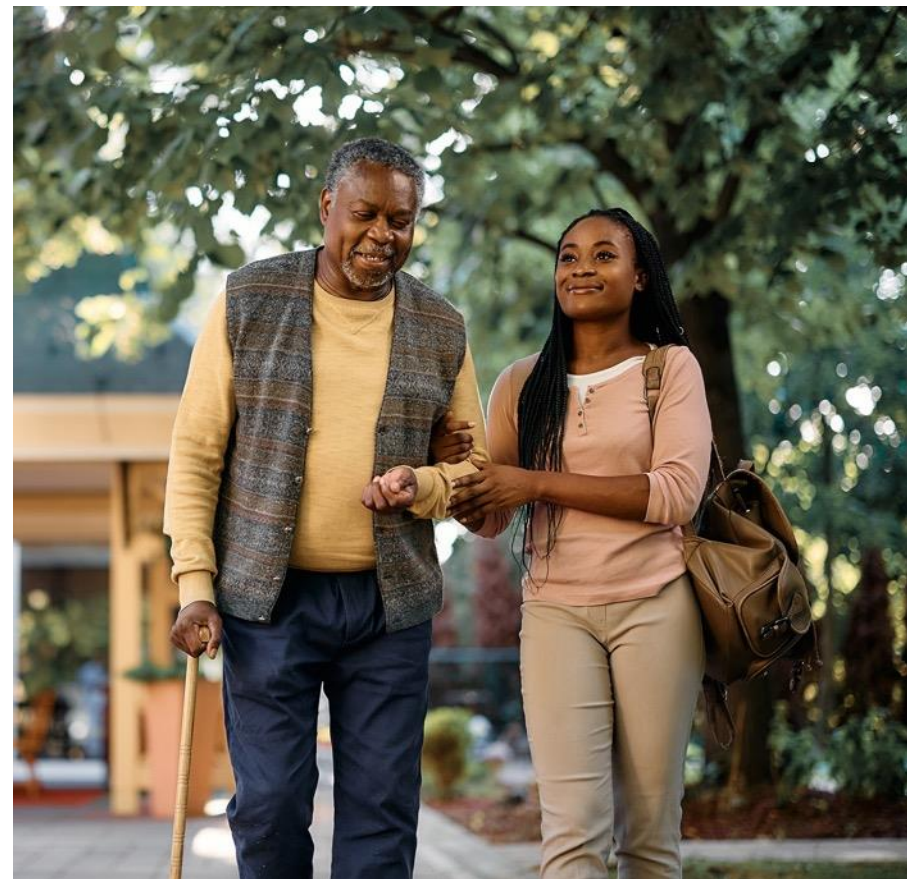




# How Can Cariloop Help?

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<sup>®</sup>, and Trustmark Life + Care<sup>®</sup> cases

**Thank you!**

