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**AMPLIFY**

Trustmark 

# Trustmark Tech: Amplifying Access, Simplifying Enrollment



**Scott Tickner**

Executive Director, Systems & Sales Operations  
Trustmark Voluntary Benefits



**Shaun Urista**

Regional Sales Vice President, West Region  
Trustmark Voluntary Benefits



# A Couple Questions For You



- How many of you have been challenged by data feeds?
- How about the inability to work with an employer's platform?

# Agenda

1. Technology Expectations in the Voluntary Benefits Market
2. Trustmark Simplink in Context
  - a. What Is It?
  - b. Where We Were
  - c. Current Initiatives
  - d. What's on the Horizon
3. System Demo
4. Trustmark Technology Solutions



**AMPLIFY**

# A Look at the Voluntary Benefits Market

## Expectations

- Carriers to work with their clients' ben admin/HRIS platform
- A plug and play solution
- It works and the policies are issued in a timely fashion

## Issues

- Find a carrier that can fit system, but not offer best products (perm life products)
- Toggling between systems for enrollment
- Poor user experience and employer headaches
- Keeping data in sync

# What Are Our Goals?

- To offer our products on the platforms you want, the way you want it with no headaches
- Increase employee participation and understanding
- Increasing participation
  - Finding more ways to support you by evolving internally to boost enrollment results



# Trustmark Simplink®

## The Answer to Your Client's Enrollment Technology Challenges

# API

## Application Programming Interface

Allows two applications to talk to each other for easier data sharing, processes and overall function



# eAPI

## Embedded Application Programming Interface

Offers the same function as API, but the screen flow is already built in and allows for simpler implementation

- Quicker integration
- Faster case setup
- Content control



# What Does Simplink Offer?

- Allows us to work with more systems
  - May help with persistency
  - Larger footprint for sales – clients and brokers have their favorite systems
- Takes on look and feel of the source system
- Better enrollment experience
- Fewer challenges
  - Cleaner data
  - Eliminates EDI feeds
  - Part of implementation

# Where Did We Start?



- Only able to enroll on Selerix
- Face-to-face enrollment was primary enrollment method

# Current Initiatives

- Investing in our API infrastructure
- Building headless API
- More native builds
- Improving on file exchange capabilities
- Enhancing the user experience related to enrollment
- Selerix enrollment user experience enhancements



# Simplink Integrations

- Accordware
- Added Benefits
- BenTek
- BenefitConnector
- BenefitFirst
- BenefitBridge
- BenefitsConnector
- BenXpress
- Bswift
- ClickEnroll
- Corestream
- Employee Navigator
- EnrollVB
- HRally
- IES
- My Benefits Advice
- Paycor
- Paylocity
- Secova
- Trustmark Enroll For Life
- Unity
- Verko
- WeCare
- Willis Towers Watson
- Workforce Junction
- WorxHR



# How Our Platforms Have Changed

## ~10 years ago

- 98% of our business existed on one platform

## Today

- Our business exists on...
  - 60% Selerix
  - 20% Native Builds
  - 20% Simplink/Enroll For Life



# What's to Come?

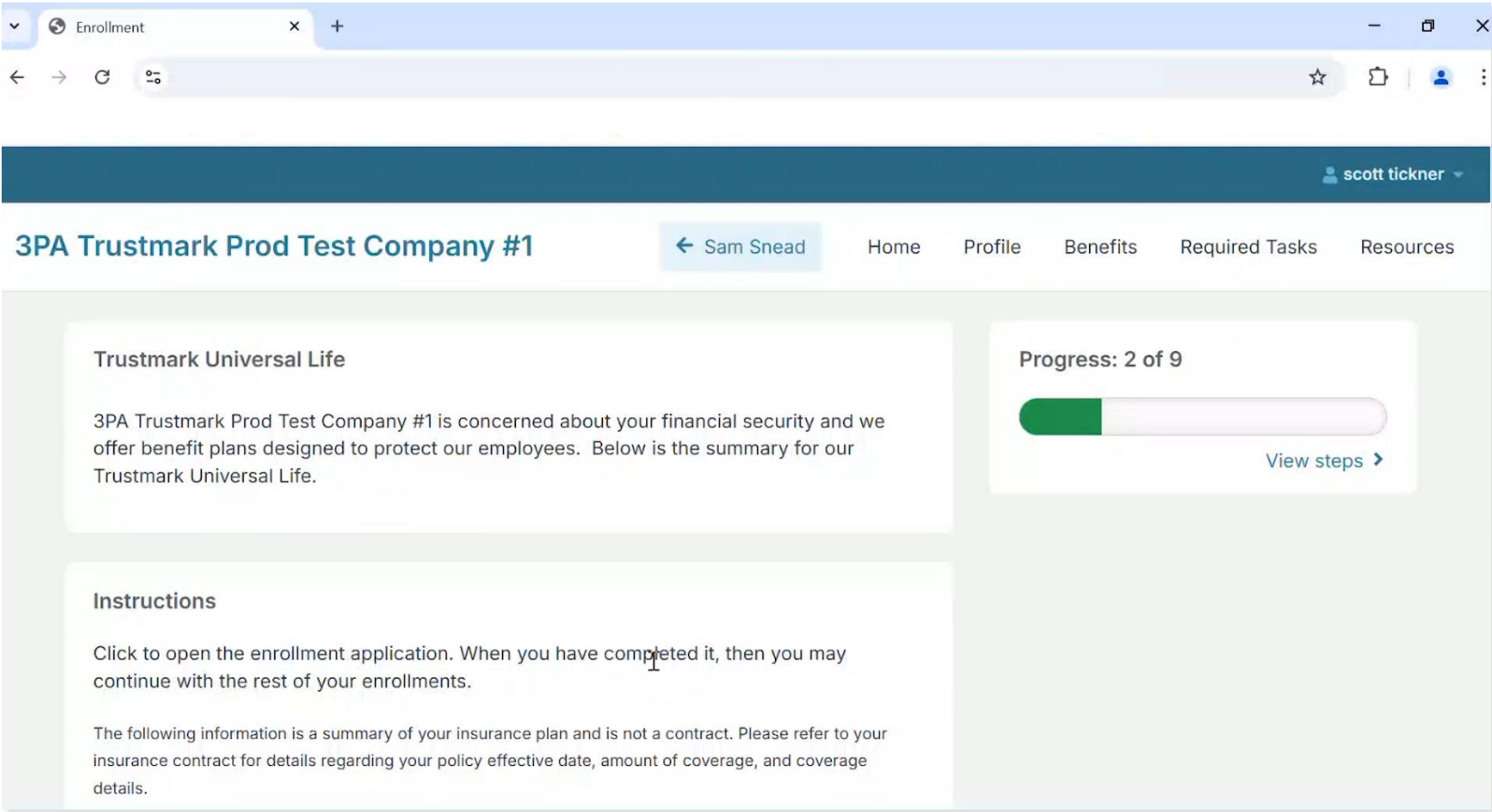


- Enrollment is a big focus in 2026
  - Hiring platforms
- Re-designed enrollment flow
- Real time options to keep systems in sync post-enrollment

# Trustmark Simplink®

## Let's Dive Deeper

# System Demo





# Investing in API Infrastructure

- LIMRA Ldex
  - Post-enrollment API – get enrollment info
  - Case building
- Enhancing our support model APIs
- Documentation, test environment, support

# Building Headless API

- Maintaining the customer experience if a platform isn't compatible with Simplink
- Rating
- Questions
- Rules
- Plan configurations

# Technology Enhancements

- As security becomes more strict, our technology stays up to date
- UX update that removes reliance on session cookies
  - Eliminates browser challenges, clearing of cache
- Enhanced API functionality
- Continuous employee experience updates and improvements based on feedback
  - New release every 2 weeks based on voice of customers
- ACH capabilities

# Native Builds

- Finding creative ways to work with more platforms
  - Group products
  - Trustmark Life + Care
  - Universal Life/Universal LifeEvents®
- Make native builds more re-buildable (APIs)
- We don't want tech to be a reason we say no





# Hosting Life Products On Native Platforms



- Depending on the platform's capabilities, we will allow our life product to be hosted natively
- Developing APIs to handle the complicated pieces
  - Rating - *In progress*
  - Questions API - *Complete*
- Exploring options on how to work with more platforms
  - Pilot on major platforms
  - Simplification of complicated aspects of product

# Platforms We've Built On Natively



- ADP
- Workday
- UKG
- Alight
- U2X
- BusinessSolver
- PlanSource
- Various producer partner platforms (AGIS, EFP, My Benefits Advice)

# Widgets Work

Enrollment Expansion Through Simplink

**\$73 million in premium**

since its inception in 2020 with 700+ cases enrolled

**\$25 million in premium**

in 2025

## Native Build Expansion:

**2023**

2 native builds

**2024**

84 native builds

**2025**

90 native builds

# ACH Functionality

- ACH functionality within Simplink
- ACH accounts for 15% of our book of business today – 3 years ago, it was less than 1%





# Key Takeaways

- Simplink is SIMPLE
- We are investing in enrollment technology to increase participation
- Technology is important and we're here to provide solutions
  - Improve Simplink and Selerix technologies
- We're continually improving our Simplink technology based on your needs
- Listening to the voice of the customer is part of our exemplary service — technology is no exception
- We're expanding native build opportunities

**Thank you!**

