MARK™

by Trustmark®

An underwriting and onboarding system for level-funded plan designs

GUIDE FOR MGAS AND BROKERS

Trustmark

Table of Contents

With MARK™ by Trustmark®

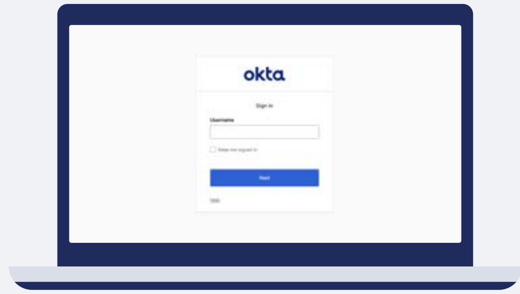
Underwriting and Onboarding is Easy

Welcome to our guide for MARK, our new underwriting and onboarding system for level-funded plan designs, that features the latest technology and a modern user experience. MGAs and brokers can use this guide to learn how to use our secure online system.

MGAs

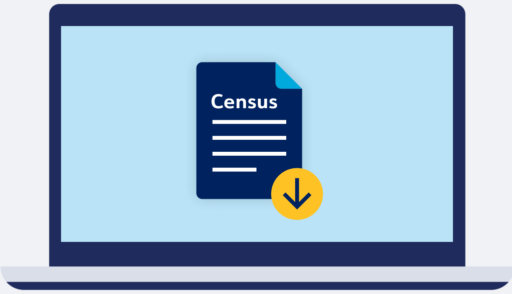
1 — Account Setup

In an email with the subject line **"MARK Access Information,"** Trustmark provides MGAs with their username and password for their MARK account.



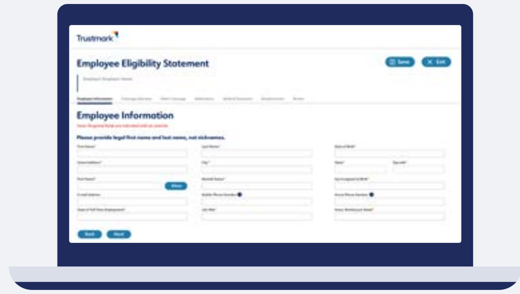
2 — System Login

MGAs log in to our system with their credentials and create a new opportunity by entering information about the broker and group.



3 — Employee Census Upload

For each group, MGAs upload an employee census containing information such as names, email addresses and home addresses, via the Census Wizard. The automated census upload securely transfers data from various formats.



4 — Employee Eligibility Statement*

Once census data is validated, **MGAs can launch the email that takes employees to their online Employee Eligibility Statement**, which must be completed with their health history.

- MGAs click on the "Submit for Applications" button to send the email to employees.

*The Employee Eligibility Statement is also available in Spanish.

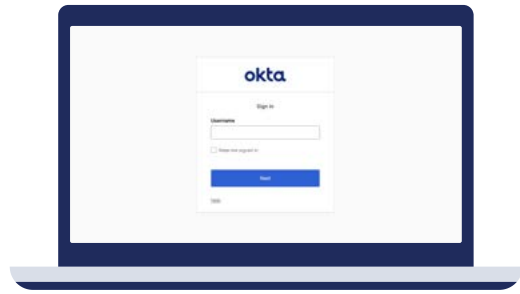
Employees can access the Spanish version when they log into MARK and select the "Cambiar Idioma" button in the upper right to switch the language to Spanish. All questions will then be presented in the Spanish language.

Please Note: The PDF that produces will display the questions in English and show the Spanish response that the employee entered.

Brokers

1 — First-Time Users

After the employee emails are launched, brokers receive an email from Trustmark with a subject line **"Action Required. Trustmark Quote for [Employer Name]."** This email provides a link to create a MARK account.

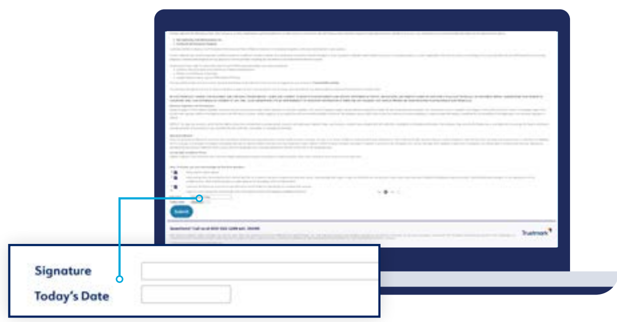


2 — One-Time Registration

Brokers create only one MARK account to view information on all clients.

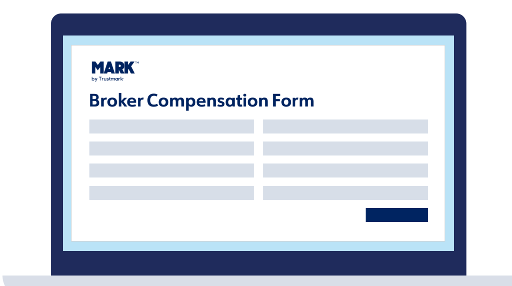
3 — Returning Users

Brokers who already have an account will receive an email with the **same subject line that provides a link to access MARK** and view eligibility statement completion status.



4 — Employer Application

After employers electronically sign and submit the employer application, brokers need to do the same.



5 — Broker Compensation Statement

Later, when a client purchases a Trustmark level-funded plan, a broker receives a broker compensation statement form to fill out via MARK.

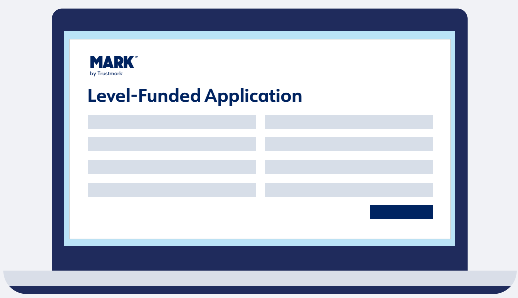
Brokers should explain to their clients that an email providing a registration link will arrive in employee inboxes.

Brokers can find the employer guide for MARK in the Materials Library after logging in at TrustmarkSB.com/login.

Employers

1 — Account Setup

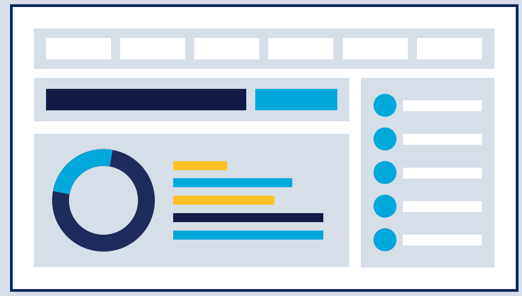
After employee emails are launched, employers receive an email from Trustmark Small Business Benefits with a subject line, **“Action Required. Trustmark Quote for [Employer Name].”** The email provides a link to create a MARK account.



2 — Level-Funded Application

Employers that purchase a Trustmark level-funded plan will later receive an application to fill out via MARK.

> **Employers should ask their employees to watch for an important email from Trustmark, so that they can complete their eligibility statement.**



For Actionable Insights

MGAs and brokers can check out their dashboard in MARK to see the progress of a group’s statements as they move toward completion.

For Accuracy and Efficiency

All required fields, marked by an asterisk, should be completed.

Employees

We're here to help.

If employees have any questions, encourage them to contact MARK technical support:

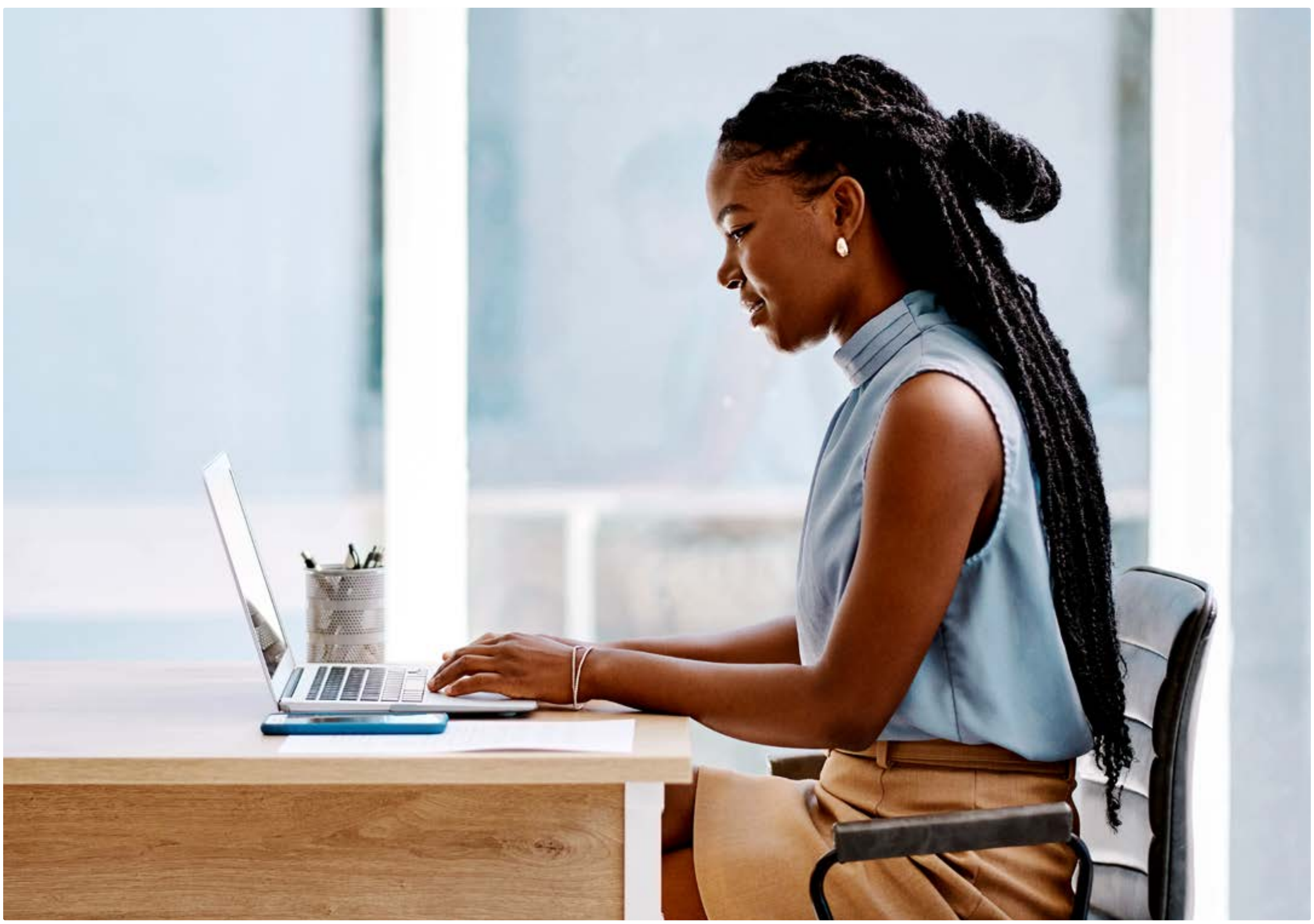
800.522.1246, option 3
Calls will be answered Monday through Friday, 7 a.m. – 5 p.m., CT.

MARK@trustmarkbenefits.com
Email queries will be answered within 24 hours Monday through Friday.

Share our employee guide:

Brokers: Find the employee guide for completing the eligibility statement online via MARK in the Materials Library after logging in at **TrustmarkSB.com/login.**

If an employee will complete the statement over the phone, please reach out to your sales contact for assistance and a telephone guide.



Who We Are

For nearly 40 years, our mission has been to pair a caring, client-first approach with the products and services that help companies solve their health benefit challenges.

With affordable, level-funded solutions featuring PPO and reference-based pricing models, our approach ensures cost containment and broad provider access, ideal for employers with five or more employees.

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Trustmark

400 Field Drive
Lake Forest, Illinois 60045
TrustmarkSB.com

Trustmark Small Business Benefits®
Plan design availability and/or coverage may vary by state. Plans are administered by Star Marketing and Administration, Inc., and stop-loss insurance and ancillary coverage are provided by Trustmark Life Insurance Company.

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