

A decorative border made of various sizes and colors of LEGO bricks (blue, green, orange, and red) arranged in a circular pattern around the central text.

2025 Clarity Team Summit

ONE VISION

MANY VOICES

Where Culture Meets Collaboration

September 8 – 9, 2025



Day One: Agenda Overview

01 Clarity Cares (India In-Office Team): Assemble for Impact

02 Our Journey + Our Future


03 Keynote

04 Purpose in Action: Living Our Values Through Service

05 Getting to Know Team Clarity

06 (Virtual team) Pictionary: The Future Is Ours to Draw

07 Clarity Cares (Woodbridge In-Office Team):
Assemble for Impact
Clarity Cares (Mesa In-Office Team):
Assemble for Impact

A decorative border made of small, colorful rectangular pieces in shades of blue, green, orange, and brown, arranged in a circular pattern around the central text.

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Monday, September 8

Our Journey + Our Future

Bill Catuzzi & Ramki Ramanarayanan

EST: 9:00 - 10:00 am | IST: 6:30 - 7:30 pm



One Vision, Many Voices Journey

Bill Catuzzi



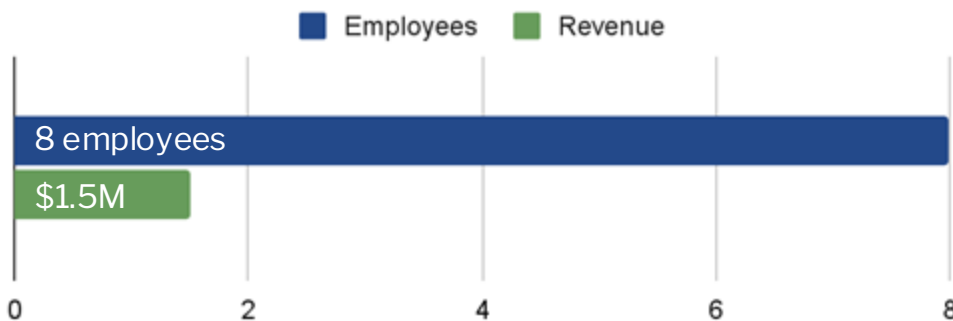
Two Companies, Two Visions



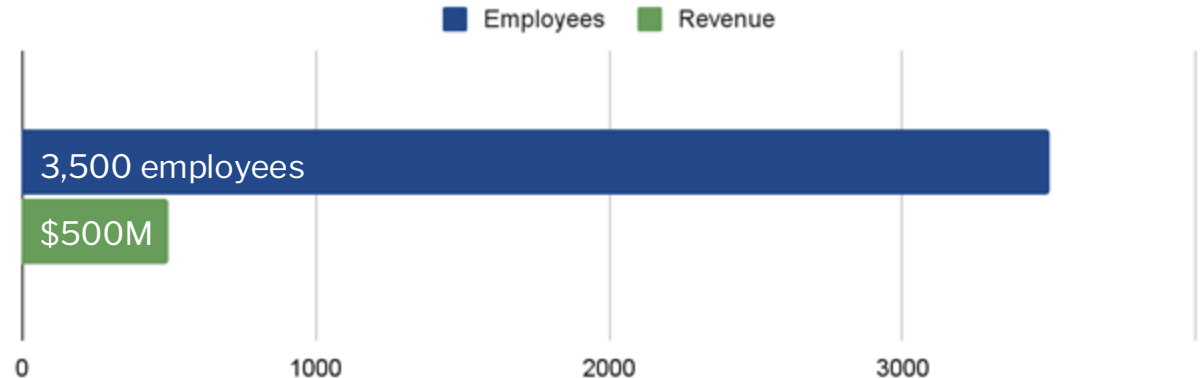
Beneflex/Clarity + Total Pay/Paylocity.

2016 A Defining Moment

Beneflex/Clarity



Paylocity



A New Name, A New Purpose

Clarity BENEFIT
SOLUTIONS

Clarity | BENEFIT
SOLUTIONS™

Our Mission

- Constant innovation with Simply Smarter Solutions
- Proactive service that empowers participants, clients and brokers
- Culture of Flexibility, Growth and Appreciation and a global vision of Communication, Passion, Inclusion, Impact and Integrity



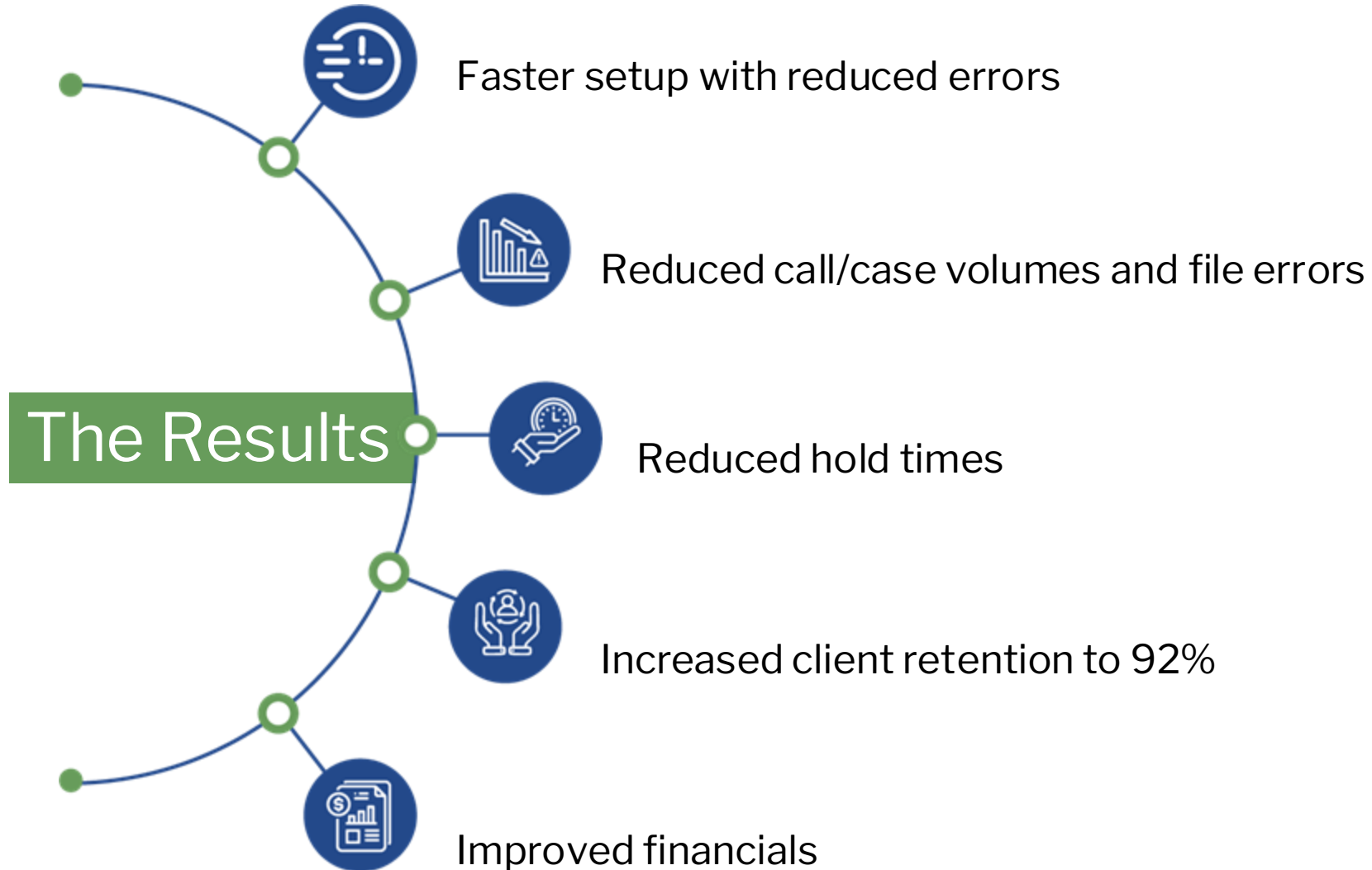
Where are we now

2025 last 9 months

- Moved finance to Chennai
- Built technology and service center in Hyderabad added 50 + team members
- Increased IT to 30+ employees
- Moved all marketing in-house
- Started the consolidation of all platforms to Microsoft
- Reduced expenses by \$5M
- Added \$1.5M in revenue
- Streamlined implementation process for COBRA from 30 steps to 3
- Went from 250 HRA plan designs to 4



Where are we now



What is our future

The Clarity Ecosystem

Seamless Connections for brokers, clients, participants, and Clarity team members

Automatic
implementations
and renewals



360 COBRA
Integration

AI-Powered
Claims Processing



Claims Carrier
Integrations

- Integration with 2,500 insurance carriers
- Instant payment of claims

Enhanced AI-driven
service experience for
Clarity team members



One Vision, Many Voices Journey

Ramki Ramanarayanan



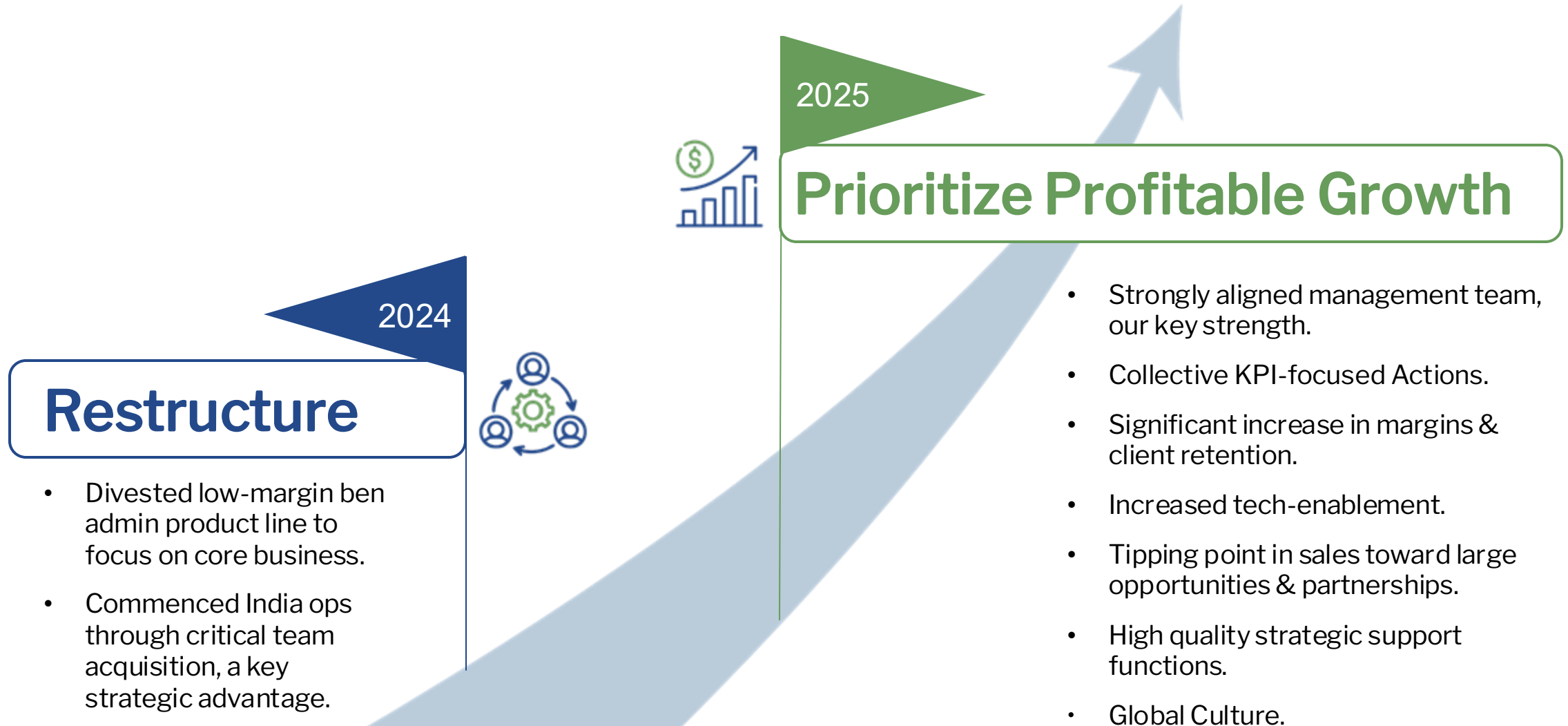
Culture Eats Strategy For Breakfast

Our Clarity 2.0 Journey as a multinational, culturally-aligned company is just beginning!

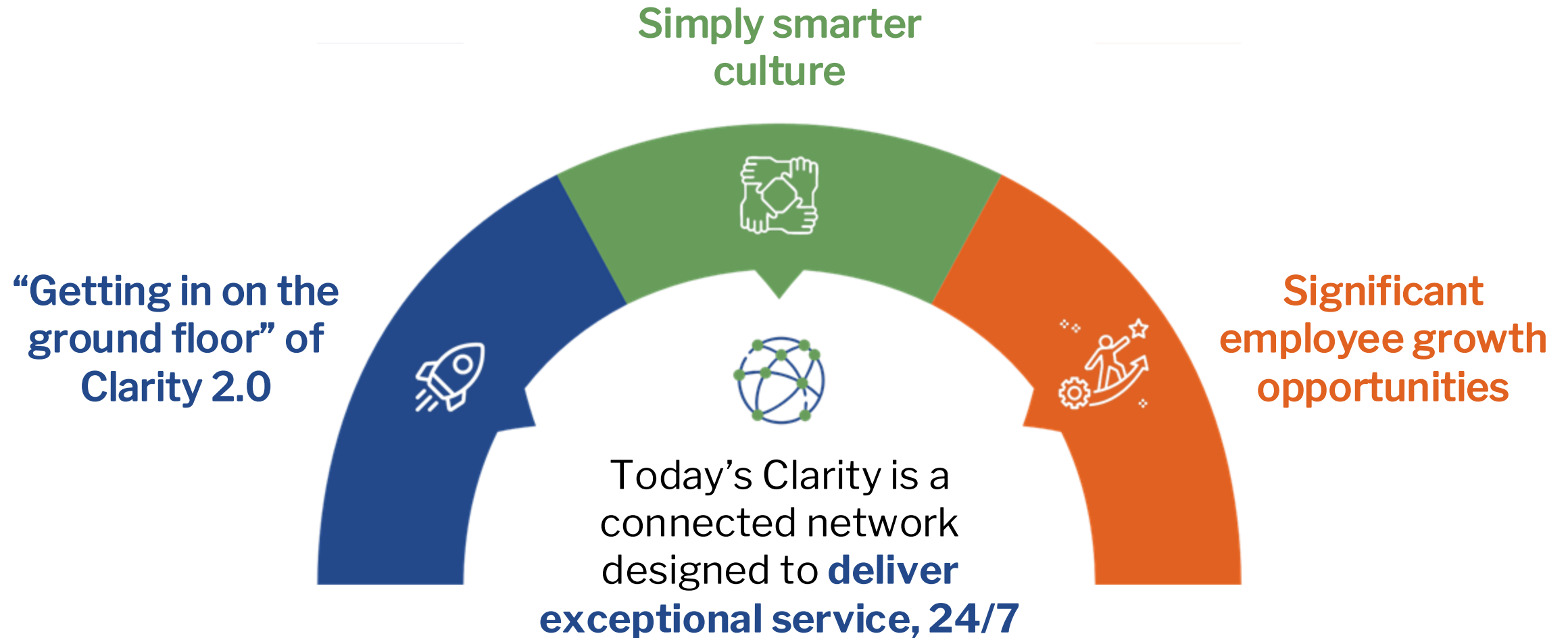
With Solid Early Results!



OneClarity Journey So Far



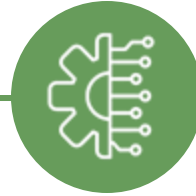
Advantage Team Clarity



Favorable Sector Dynamics



We operate in a favorable sector with attractive fundamentals, regulatory stability & proven playbook for success.



Our competitive landscape is shaped by technology driven, high-efficiency, acquisitive, culture-focused winners.



Highly-fragmented industry affords us a solid opportunity to grow through acquisitions (200-300 potential targets).

Vision 2030 for Sector Leadership

Our Journey of becoming a **Top 10, \$100M sector-leader** is driven by execution of proven strategies and fueled by our Culture!

