



A PIONEER OF  
DIGITAL TRANSFORMATION



# SUCCESS STORY

## THOMAS FINANCIAL

THE OLD SCHOOL WAY

Thomas Financial being a leading broker in individual business in Florida represented benefits segment. They wanted to progress and win the group business, and sensed the industry advancing towards bringing efficiency and transparency to the Employee Benefits space and cater to the digital-native millennial clientele. Without technology, it seemed daunting.

Major challenges faced before partnering with UZIO :



The abundance of paperwork, to-and-fro for data collection and validation



Clients' raised expectation and demand for digital interface



Adoption of new technology by the employees and clients



Need for business growth, maintaining bigger product portfolio and superior client service

11-50

EMPLOYEE SIZE

1975

FOUNDED



Since 1975, Thomas Financial is providing Life Insurance, Employee Benefits, Wealth Management and Retirement Planning services to high net worth individuals and growth companies in Florida and nearby areas. The highly talented team of Thomas Financial has a passion for progress and growth and they always strive to be a leader in world-class life insurance solutions. Thomas Financial is based in Tampa, Florida.

# 2017

## STARTED AS UZIO PARTNER

Thomas team then planned to onboard a technology that can reduce all the above-said challenges and provides an easy-to-use digital interface to all clients. Post attending several demos Thomas Financial chose UZIO.



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THE PROBLEM SOLVER

While going through various demos, **JS Gagnon, President, Employee Benefits** from Thomas Financial team had a notion that training complete staff and clients while onboarding technology will be a heavy lifting task. **Shawn, EVP – Employee Benefits**, from the team wasn't sure that all the needs can be sufficed by a single platform.

With all these thoughts, they decided to go with UZIO, and in return this partnership opened a plethora of success avenues for Thomas Financial through not just digitizing their agency business and completely transformed the way they did business. Handheld Onboarding made their operations easier.

Thomas Financial couldn't have partnered at any other opportune moment when they were on the urge of expanding their Group Health benefits segment.



“The impact on our business that this technology has brought us has been tremendous...”

**RICK THOMAS**  
CEO



“..we are able to offer small and medium sized companies, what fortune 500 companies have access to.”

**JS GAGNON**  
PRESIDENT, EMPLOYEE BENEFITS



PASSING WITH FLYING COLORS

With UZIO, Thomas Financial sensed a paradigm shift in operations.

They started pitching their clients digitally, brought more transparency in their client's benefit expenditure, exchanged quality communication with their client to support, and provided an intuitive digital interface to client's employees for accessing and updating all their benefits information.

Sloppy methods of business operations were all out from the organization, differentiating them against the competition.



On-boarded new client in just 24 hours



Trained & Digitized the agency, as well as their SMB clients



Access to benefits anywhere, anytime



Brought all the agency clients in one place

WATCH COMPLETE VIDEO

SCHEDULE A DEMO

BE THE NEXT UZIO SUCCESS STORY



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