

Frequently Asked Questions Regarding Acquisition of Pro-Flex by BRI

Who is Benefit Resource (BRI)?

Benefit Resource (BRI, BenefitResource.com) provides dedicated pre-tax account administration and continuation services nationwide to clients ranging from small businesses to Fortune 100 companies. BRI pioneered paperless card technology and continues to lead the industry with a one-card solution and contactless payment for FSA, HRA, HSA, and Parking/Mass Transit plan administration.

BRI is based in Rochester, NY with a strong service culture and dedicated account administration approach. BRI has been in business for over 30 years and has over 200 team members. It provides services to over 5,500 employer plans and 400,000 plan participants.

In July 2023, BRI was acquired by Millennium Trust Company. Millennium Trust Company solves important business challenges through innovative financial wellness solutions that help people plan, save, and invest. Millennium Trust, established in 2000, has approximately 2,000 team members, headquartered just west of Chicago, in Oakbrook, IL.

What can we expect regarding the acquisition?

You can expect continued access to the products and services you rely on and will continue to work with your existing contacts with Pro-Flex. Over the next several months, the Pro-Flex and BRI teams will evaluate any potential changes and enhancements to the services you receive. As opportunities are identified to improve or expand the services you receive, we will work closely with you and your benefits consultant to communicate and discuss what may be required. We are committed to providing clear communication and milestones to minimize any potential disruption.

What is the value that BRI brings to Pro-Flex?

Both companies have long histories of providing the highest levels of service, dedicated account management, effective technology solutions, and expertise to solve the administrative challenges of clients and their employees. Together, we will continue to deliver on this value to our partners, employer clients and their employees. Additionally, BRI is a recognized leader in benefits education and communication and is routinely featured and provides industry expertise to publications like SHRM, HR Morning, Benefits Pro, EBN News, and more. Over the coming months, you may begin to receive communications from BRI regarding articles, eBooks, webinar events, best practices, and legislative happenings to ensure you are getting the most out of the programs you offer.

Will there be any changes to who will be serving my account or my existing contacts?

No. All existing support and service arrangements will continue without interruption. You will continue to work with your Account Management team.

How soon will changes happen?

Business operations are expected to remain largely unchanged at this time. As we begin to understand opportunities to align services, we will send additional communications which outline any changes, actions that may be required and timelines (as applicable).