

A large, diverse crowd of people, mostly wearing blue and orange t-shirts, are cheering enthusiastically with their arms raised in the air. The background is a blurred outdoor setting, possibly a stadium or event space. The text "WE ARE ONEDIGITAL" is overlaid in the center, with a stylized logo between the words "ARE" and "ONEDIGITAL".

# WE ARE ONEDIGITAL





At OneDigital, we harness the power of one to solve complex challenges for businesses and people. Scan the code to the left to **watch the video and learn more.**

## ABOUT ONEDIGITAL

OneDigital delivers strategic advisory consulting and technology-forward solutions to more than 85,000 employers across the nation. As employee health care, wellness and workplace benefits continue to converge, businesses of all sizes have relied on OneDigital's exceptional advisory teams for counsel in employee benefits, wellbeing, human resources, pharmacy consulting, property and casualty solutions, as well as the retirement and wealth management services provided through OneDigital Investment Advisors. OneDigital's commitment to technology and innovation enables its 3,000 advisors to deliver the most modern and intuitive customer experience anywhere in the industry. OneDigital has been named as a Best Place to Work in Insurance by Business Insurance. **For more information, visit [onedigital.com](https://onedigital.com).**



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## WELCOME TO ONEDIGITAL

We emerged in the dot-com era as an organization uniquely qualified to manage large volumes of employee benefits customers via outsourced broker partnerships in the early 2000s. From there, we expanded into advisory services, partnering with like-minded agencies across the country. Our unique ability to evolve and adapt to the needs of the market propelled our growth into human resources, wealth and retirement services. In addition, we have welcomed specialized services in pharmacy, global and risk. When combined with our core insurance, financial services and HR offerings means we can bring an end-to-end experience to employers and individuals and true disruption to an industry ripe for change.

**This brand book extends and manifests our brand promise and reinforces our commitment to our employees and all those we serve.**

# WE ARE ALL IN



# We are a company of consequence.

Our entrepreneurial drive has fueled more than 20 years of strategic expansion.

We purposely seek out like-minded partners. This intentional growth mindset enables us to foster a network of passionate, collaborative entrepreneurs with the freedom to grow individually as we build collectively.



Adam Bruckman, Mike Sullivan and early pioneers found Digital Insurance.

We make our inaugural appearance on the Inc. 5000 List of Fastest Growing Companies.



We introduce *Digital Small Business Select* as our innovative platform for small businesses. We launch *Digital Benefit Advisors*, staking our claim as an industry-leading M&A operation for retail brokers.



Time for a rebrand! We reenter the market as OneDigital Health and Benefits.

FEBRUARY 2000

JANUARY 2007

JULY 2011

OCTOBER 2016

JANUARY 2018

JANUARY 2020

JANUARY 2021

JANUARY 2022

We expand into human resources consulting.

We acquire 13 retirement + wealth firms, moving into the next chapter of our journey. With this evolution, we drop Health and Benefits from our name to be inclusive of each of our divisions.

Our growth continues and we expand to offer property and casualty services.

We announce the first-in-the-industry broker-carrier API connection.





# ONE

We stand as *one*  
with our customers, our  
partners and each other.



We deliver the modern  
technological experience that  
today's consumer expects.





# ONEDIGITAL

THOUGHTFULLY  
HUMAN

TECH  
FORWARD

We show up as fierce innovators, caring and adaptive leaders, challenging partners, creative problem-solvers and champions of individuals and families.



# We offer employers and individuals a holistic experience.

END-TO-END CAPABILITIES

## EMPLOYEE BENEFITS + INSURANCE

We deliver benefits strategies that align with the health care needs of organizations at all stages of their growth journey. We put data, insights and guidance to work for employers to help them make smarter choices about health care spending and focus on taking care of their most important investment – their people.

## FINANCIAL SERVICES

We tailor retirement plans, wealth management conversations and financial wellness programs to meet individuals' needs. We work with employers to reevaluate their retirement programs to ensure that they provide the tools and individual guidance that employees need to stay focused on meeting today's challenges, while preparing for a successful tomorrow.

## WORKFORCE + HR CONSULTING

We help employers build exceptional workplaces by developing their people and building winning teams. Via our integrated, personalized approach, we partner with employers to expertly manage programs for their workforce. This consulting expertise helps business leaders stay out of the weeds and ensures that all aspects of talent acquisition and retention strategies become a competitive advantage for their business.

## PROPERTY + CASUALTY INSURANCE

We help employers understand the potential risk and liabilities their business could face and provide guidance to safeguard their company – in both the good times and bad. By delivering a tailored, comprehensive risk strategy, we help organizations manage risk while maximizing the protection of the business and its people.

# We solve complex problems.

Insurance, financial services and HR are complex business necessities for employers, further complicated by many choices, tools, regulations and challenges. Simultaneously, employees and their families struggle to access affordable health care and get out of debt. No one is better positioned to solve both the business challenge *and* the people challenge.

## ONE TEAM

We make it easy for employers to work with a single team and build a holistic workforce strategy that enables people to do their best work and live their best lives.

## ONE SOLUTION

We provide a single platform for employers of all sizes, enabling them to deliver modern financial services, insurance and HR strategies that actually benefit their people.

## ONE PURPOSE

Our simple focus on doing well by doing good means that we can help businesses grow and help people recognize their full potential.





# We are challengers.

Our unique market position gives us an opportunity to drive positive change for our customers and the industry. This allows us to help businesses of all sizes design modern financial, insurance and HR strategies that actually benefit their people.

We do this through a relentless passion for teaching our customers insights into their business, empowering them to reach their highest potential.

# We can do well by doing good.

## OUR BRAND PROMISE

We guide people through two of the most important and complicated challenges they face today – affordability of health care and financial insecurity. When we guide employers to break free from the systems stacked against them, we can then help people do their best work and live their best lives.



**Unleash  
Business Growth**  
*and*  
**Power People  
Potential**

[MASTER EXTERNAL MESSAGE]



# We have your back.

CULTURE = BRAND

We are in the people business. Taking care of our people and putting total wellbeing above all else drives our success for individuals and for the company as a whole.

Intentionally creating a diverse and inclusive workforce is fundamental to our core values and strategic business goals. This fosters engagement and dedication in our teams that strengthens our contributions to our communities and the customers we serve. With initiatives like our Diversity, Equity and Inclusion program, we are committed to cultivating stronger connections and creating a more meaningful place to work and live.



**Our fierce culture of caring, and the way we openly and boldly share a range of perspectives, is a result of our commitment to inclusion.**

## **FRESH THINKING**

We lead market trends, we don't follow them—customers can count on us to look around the corner on their behalf.

## **RELENTLESS**

We've got our customers' backs when they need us most, and we won't stop working until we have a solution that works for them.

## **INVESTED**

We own our customers' business results like they're our own, and stand by their side to deliver results.

## **RESPONSIVE**

We put the needs of our customers and their people first. When our customers need us, we are there every time.

## **STRATEGIC**

We are purposeful in building holistic and integrated strategies that unleash business growth and empower people potential.

## **PERSONAL**

We know what's important to our customers and their people, their biggest challenges and what success looks like for them.

## **TRUSTWORTHY**

We give our customers the straight talk necessary to make complex decisions, even in the most challenging times.

## **OPTIMISTIC**

Where others see challenges too difficult to own, we see opportunities to capture and lead the market.

# We are defined by our values.

CORE VALUES



# We have a customer experience vision.

We provide trusted advice, products and solutions delivered by one team and backed by one purpose—to do well for business by doing good for people. Our customer-centric approach allows us to deliver valuable and personalized guidance at a scale that will impact the lives of millions, in turn enabling businesses to grow and employees to live at their highest potential.

## OUR FOUR CUSTOMER EXPERIENCE PILLARS

**KNOW THE CUSTOMER**

**TEACH SOMETHING NEW**

**MAKE IT EASY**

**DELIVER ON THE PROMISE**



**BLUE**  
*Intelligence, Trust*

**GREEN**  
*Action, Prosperity*

**ORANGE**  
*Creativity, Enthusiasm*



# We are purposeful in our design.

Our logo is an intentional reflection of our culture and brand. The three-colored triangle mark is called our Triad.

This shape is a modernized version of our legacy brand logo that honors our history and looks optimistically toward the future.

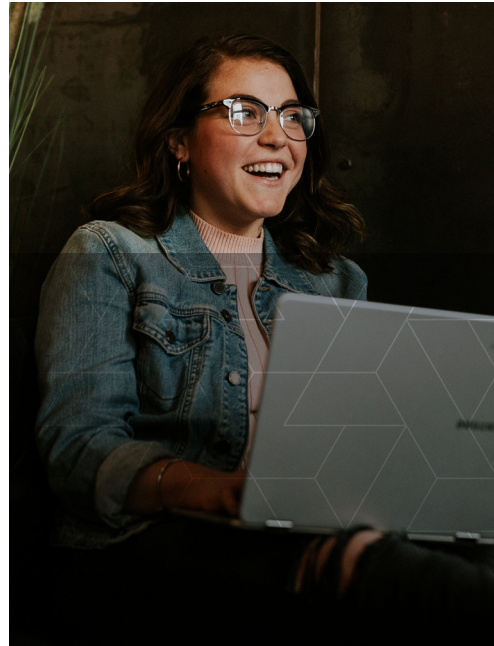


# We use imagery with intention.


## BRAND AESTHETIC

We use imagery that portrays personal and genuine moments, inviting our audience to emotionally connect with our brand.

The way we show up in our design is refined, distinctive and inviting. Our design supports the content so individuals can easily absorb the information and enjoy the experience.



**Our imagery reflects and celebrates the individuals we work with.**



**We relate to  
customers' challenges  
and passions and  
speak to them in a  
familiar, warm and  
approachable way.**

# We speak plainly and warmly.

## BRAND VOICE

Our tone is informal but expert. While authoritative when speaking to the solutions we provide to customers, we use warm and approachable language. Our areas of focus are full of complex concepts and terms not used by our customers in everyday conversation.

Although the resources we provide may be technical in nature, we distill this content to be accessible and clear for customers, resembling the feeling they get when being advised one-on-one by their OneDigital partner.





# WE ARE ONEDIGITAL

Whether you are an employee, colleague, customer or partner, we seek to inspire you to go all in and embrace an unwavering commitment to success for yourself and those we serve.

**Together, we can do our best work and live our best lives.**



[onedigital.com](https://onedigital.com)