



2022 Benefits Open Enrollment

MARK YOUR CALENDAR! Enrollment for your 2022 benefits will be November 8 – 19, 2021. Important information about your 2022 benefit offerings will be shared soon, stay tuned for details.

Upcoming BrightPlan Webinars

Friday, November 5, 2021: Last Minute Tax Saving Strategies

Time: 10:00-10:30 AM, PST

Hosts: Daniel Lee and Scott Spann

Registration Link: <https://web.brightplan.com/register/finance-fridays-last-minute-tax-savings-11-05-2021>

Description: Will you get a large tax refund? Or will you owe taxes next year? Tax planning, particularly if you have stock compensation or an investment portfolio can be challenging. Not to mention that the recent tax law changes can make it difficult to keep up with everything you need to know. Join us to review what last-minute steps may still be available to reduce your taxes for the 2021 tax year, and what you can do to set yourself up for success for future years.

Friday, November 12, 2021: Successful Spending for the Holidays and Beyond

Time: 10:00-10:30 AM, PST

Hosts: Scott Spann

Registration Link: <https://web.brightplan.com/register/finance-fridays-holiday-spending-11-12-2021>

Description: The holidays should be a joyous time to spend with friends and family. When it comes to managing our money, this is also a time that can stretch a budget a little thin. Whether it's planning for upcoming vacations, setting aside money for gifts, or treating yourself, learn how you can master the holiday spending season so the New Year doesn't begin with the burden of debt. Join us to learn proven money management techniques and spending strategies that will help you balance enjoying the holidays while still focusing on your future self.

Friday, November 19, 2021: Get Started with BrightPlan

Time: 10:00-10:30 AM, PST

Hosts: Scott Spann and Dan Stokes

Registration Link: <https://web.brightplan.com/register/get-started-with-brightplan-11-19-21>

Description: More people than ever are using BrightPlan to boost their financial wellness. Ready to get started? Your company provides you with access to BrightPlan so you can get solid financial advice in your best interest. We're hosting a 30-minute webinar to get you started. Join us to learn how easy it can be to keep track of your money, set financial goals, **and chat** with a financial advisor. You'll leave with a retirement goal, advice on how to invest your 401(k), and next steps to improve your financial wellness.

Summary Annual Reports

401(k)

Below is a link to the Summary Annual Report ("SAR") for the Genesys Retirement Savings Plan (the "Plan"). The purpose of this SAR is to provide a basic summary of the Plan's financial information, plan expenses, value of plan assets and employer and employee contribution amounts. Please note that you may access a current copy of the SAR online at any time by visiting mygenesysbenefits.com. You also have the right to request a paper copy of the SAR, free of charge, by contacting the Genesys Benefits team at Benefits.team@genesys.com.
<https://mygenesysbenefits.com/wp-content/uploads/2021/10/2020-Summary-Annual-Report-10.05.21.pdf>

Health & Welfare Plan

Below is the link to the Summary Annual Report ("SAR") for the Genesys Cloud Services, Inc. Health & Welfare Plan. The purpose of this SAR is to provide a basic summary of the contracted vendors, the 5500 and employee contribution amounts. To obtain a copy of the full annual report, or any part thereof, contact the Genesys Benefits team at Benefits.team@genesys.com.
<https://mygenesysbenefits.com/wp-content/uploads/2021/10/Health-and-Welfare-Plans-SAR-2020.pdf>

[Medical \(UMR with UHC Choice Plus\)](#)

[Medical \(Kaiser Network\)](#)

[Medical \(Hawaii\)](#)