6 STEPS TO ACCURATE LARGE GROUP QUOTES

These steps identify the information needed to help expedite your large group quoting needs and ensure swifter turnaround times.

1 About You

- Your company name, address, phone/fax numbers/agent name, and license number.
- Your deadline to receive the proposal so we can be realistic with time frames and keep you up to date (ASAP is not accepted by carriers).
- Are you the broker of record?
- Requested commission rate, if not standard?

2 About the Group

- Company name and full address.
- Headquarters location, if different.
- Industry classification and/or SIC code.
- Reason the group is out to bid (rates, service plan design, etc.).

3 About the Plan

- Proposed effective date.
- Employer contribution toward employee/dependent costs.
- Current carrier and carrier history.
- Requested benefits or indicate to match current benefits.
- If LTD/STD is requested, please give occupations and salaries.
- Current benefit outlines or plan descriptions.
- Current and renewal rates.

4 Additional Underwriting Information

- Disclosure of any known large claims (over $25,000) in the last year.
- Known pregnancies and due dates.
- Information on any known disabilities (employee or dependent).

5 Census Data

- Provide member level census (employees & dependents): Full name, gender, date of birth, home zip code.
- Identify COBRA participants
- Indicate coverage (HMO, PPO, POS, or Kaiser) for each employee.
- If life/disability is requested, provide salaries for each employee.
- If disability is requested, provide job title for each employee.
- If coverage is by class, provide class availability.
- Provide work zip code if office has multiple locations or members work from home.

6 Time Guidelines

- Medical carrier response time can vary from 7 to 10 business days.
- Ancillary carrier response time can vary from 5 to 7 business days.

[Click to access our Large Group RFP]

Contact one of our large group specialists with your completed 6 steps!
amwinsconnect.com | 866.570.5474

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