

AGENT REQUEST FOR PROPOSAL



HOW TO SUBMIT A PROPOSAL REQUEST:

1. Fill out agent and client information in its entirety.
2. Indicate contribution level.
3. Email or fax completed form to the Coterie Advisory Team.
4. For questions, call call the Coterie Advisory Team

Coterie Advisory Group Inc.

Phone: 602-884-8096

Fax: 602-491-2088

Email: info@coterieadvisors.com

AGENT INFORMATION

Name _____ Agent# _____

Agency Name _____

Phone _____ Fax _____ Email _____

CLIENT INFORMATION

Is this a current client?

Name _____ SIC/Industry _____

Name of Business _____

City _____ State _____ Zip _____ County _____

Requested Effective Date _____

Please describe any subsidiaries or other locations

FUNDAMENTAL CARE QUOTE REQUESTS

The guideline for a timely Fundamental Care new case submission is a minimum of 10 working days before the requested effective date. Typical underwriting can take up to two weeks depending on completeness of a submission and how quickly missing information is received. An eligible employee is defined as an employee considered by the employer to be eligible to enroll in the plan. Minimum participation requirement is 5 enrolled or 10% of eligible employees, whichever is greater.

CONTRIBUTION LEVEL:

Outpatient: \$50 100%

Inpatient: \$50 100%

Total number of full-time equivalent employees employed by organization: _____

Total number of employees that would be eligible to enroll in Fundamental Care: _____

List the number of eligible employees that reside in each state:

:

Please define the class or classes of employees that would be eligible for Fundamental Care.

