

Request for Proposal (RFP) Checklist

Use this checklist when requesting a quote for prospective clients.

Information Required:

- Group Size
- Effective Date
- Census, including:
 - Date of Birth
 - Gender
 - Plan ID
 - Employee Status
 - Dependent Status
 - Zip Code
 - Current and Requested PPO Networks
- Details of Requested Coverage
- Schedule of Current Coverage
- 18–24 Months Rate History
- Name and Address of Current Carrier or TPA
- Requested Commission



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AGENT USE ONLY.

RFP 0709