

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@coterie-advisors.com

AGENT INFORMATION

Name _____
Agency Name _____
Phone _____ Fax _____ Email _____

CLIENT INFORMATION

Is this a current client? _____
Name of Business _____
City _____ State _____ Zip _____ SIC/Industry _____
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 for the MEC or 10 enrolled or 30% of eligible employees, whichever is greater for Tri-Level offering.

CONTRIBUTION LEVEL:

Outpatient:	50%	100%
Inpatient:	50%	100%
Tri-Level:	50%	100%

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

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

