



Request for Proposal Checklist

In order to tailor a program to fit your specific needs, we request the following information:

Documents Needed

1. Census

- A listing of all employees with their date of birth, zip code, gender, plan elections, and current tiers (i.e single, employee + spouse, employee + child(ren), employee + family)
- Aetna now requires census with dependents listed in the 51-99 lives department.

2. Most Recent Invoice

- Most recent billing statements for all employee benefits.

3. Current Detailed Benefit Summaries

- Brief description of medical plans

4. Renewal Rates

- Benefit/rate information sent by current insurance carriers prior to policy renewal.

5. If the group is over **100 enrolled** then we will also need the following:

- At least 12 Months of Claims Experience (If additional months available, please provide)
- Large Claims Matching the Experience Dates

Information Needed

- Effective Date
- Company Name
- Company Address (If more than one address, please list)
- Nature of Business
- Carrier History (At least 5 years of history, if available)
- New Hire Waiting Period
- Employer Contributions
- If HRA Funding Applicable, please provide
- Benefit Classes, If Applicable
- Employees' W-2 Earnings Listed on the Census for Affordability Testing

Miscellaneous Info

- Please note if there are any special circumstances carriers should know about.