

# Pre-Proposal Questionnaire



The following worksheet will help you collect the data needed to submit a request for proposal. Complete the form below and print and fax to (972) 929-2973.

Date			
Broker Name		Are you the current broker of record?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Agent Name		Phone	
Email		Fax	
Client Name		SIC Code	
Client Address			
Total Employees		Number of Eligible Employees	
States Where Eligible Employees Reside (List)			
Number of Locations Where Eligible Employees Work		Number of Hours Eligible Employees Must Work	
Current Plan		Number of Employees in Plan	
Does employer make contributions?	<input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, what % of employee cost?	
Reason Employer is Looking for a New Solution			