



LAURENCE F. LEE, III

From: Whitney Johnson-Rule for Larry Lee (agent) / M. Lynn Turner (agent)

Date: July 14, 2014

Re: **ABC COMPANY**  
**Bid Request: Health**  
**Effective Date: 10/1**

Please immediately complete and return by fax or email, the attached **“Confirmation of Receipt.”**

Please provide a Group Health quote for ABC COMPANY. This is a clothing manufacturing (sewing) business, situated in Florida (zip: 32224) with locations here and in New York. Please note: this group does not currently have health insurance benefits, but will be putting them in place due to ACA.

All necessary information is provided. Please read this request in its entirety. Should you need further information, questions or if you don't receive all materials below, please contact me immediately. If you receive this information in error, please forward to the appropriate person and contact me. Please quote the following plan design(s); please **also quote HRA, HSA plans as well as packages** you feel may deliver a better value for our client.

- Information Attached: Census

- Background

Full-Time: 30 hours per week

Eligibility: 1<sup>st</sup> of the month following 60 days

Effective Date: 10/1/14

Provide Quotes By: 7/30/14

Commission: Flat 5%

In the interest of time and keeping *your* work to a minimum, we welcome your informal proposals via email. Also call if you wish to discuss your competitiveness on this case. If you should have any questions regarding this case, please call our office at (904) 354-8989.

**PLAN ANALYSTS**

1 Independent Drive, Suite 3125 • Jacksonville Beach, FL 32202 • (904) 354-8989 • FAX (904) 830-4862  
• EXCELLENCE IN EMPLOYEE BENEFITS •

**Confirmation of Receipt**

\_\_\_\_\_ Page(s) Including this page.

To: Whitney Johnson-Rule  
Email: wjohnson-rule@plananalysts.com  
Co/Dept: Plan Analysts, Inc.  
Re: **ABC COMPANY Bid Request**

**I.** Please initial all applicable boxes below and return by email/fax **immediately**.

1.  I have received the request for proposal for ABC COMPANY
2.  I intend to issue a proposal to:  Plan Analysts, Inc.  
 To someone other than Plan Analyst  
Who: \_\_\_\_\_
3.  I do **NOT** intend to issue a proposal.  
Reason: \_\_\_\_\_

**II.** I  Do /  Do Not agree to keep the information contained in this package **CONFIDENTIAL**. My company will not disclose this information or ABC COMPANY and/or its subsidiaries.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Company: \_\_\_\_\_ Date: \_\_\_\_\_

**III.** This Information came to me in error.

It will **not** be forwarded. It will be destroyed.

It will be **forwarded** to the party below to respond to this RFP:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Dept: \_\_\_\_\_

**PLAN ANALYSTS**