



From: Catherine Smith for M. Lynn Turner (agent)

Date: December 18, 2014

Re: **Rooftec Systems**
Bid Request: Health, Basic Life/AD&D
Renewal Date: February 1, 2015

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

Please provide a Group Health and Group Basic Life/AD&D quote for our client, Rooftec Systems. Rooftec Systems specializes in commercial, industrial, and residential roofing and maintenance services serving the NE FL and SE GA areas. Located: 2023 New Berlin Rd. Jacksonville, FL 32218

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
Benefit Summary(s) – N/A (Virgin Coverage for Medical)

- Background

Full-Time: 30 hours per week

Eligibility: 1st of the month following 60 days

Health Contribution:

Employer pays TBD

Employer pays TBD

- Cont'd p. 2 -

PLAN ANALYSTS

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

CURRENT HEALTH BENEFITS:

N/A – virgin coverage

For quoting purposes, please quote the most popular PPO, HMO, and HSA plans. We want to provide a range of affordable plans for the group to review. If you need specifics, please reach out to me as soon as possible.

HEALTH RATES:

N/A – virgin coverage

CURRENT BASIC LIFE/AD&D BENEFITS:

100% Employer paid
Flat \$25,000
Age reduction begins at age 65 (35%)

BASIC LIFE/AD&D RATES:

	<u>CURRENT RATES</u>	<u>RENEWAL RATES</u>
Basic Life	\$.039	\$.345
AD&D	\$.032	\$.032

Renewal Date: February 1, 2015

Provide Quotes By: December 30, 2014

Commission: Flat 5% for Health
Flat 10% for Basic Life/AD&D

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

Confirmation of Receipt

_____ Page(s) Including this page.

To: Catherine Smith
Email: csmith@plananalysts.com
Co/Dept: Plan Analysts, Inc.
Re: **Rooftec Systems Bid Request**

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

1. I have received the request for proposal for Rooftec Systems
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 Rooftec Systems 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