



LAURENCE F. LEE, III

From: Lisa Girgis for Larry Lee & Lynn Turner (Agents)

Date: August 16, 2016

RE: **Intuition, LLC.**
Bid Request: Group LTD & Life
Renewal Date: January 1, 2017

Please immediately complete and return by fax, the attached **“Confirmation of Receipt.” (p.3)**

Please provide a Group LTD & Life quote for our long time client, Intuition Systems, Inc. They have been a leading local financial services company located in Jacksonville, FL 32256 with approximately 231 employees in 3 locations spread across FL.

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 propose alternative(s)** you feel may deliver a better value for our client.

- Information Attached: Census – 232 rows
Gender, DOB, DOH, zip codes & occupations
Claims – PDF format
SPDs – PDF format

- Background

Full-time: Life - 25 hours per week (Regular & hourly part-time EEs are eligible)
LTD – 30 hours per week (Regular part-time EEs are eligible)

Eligibility: Life - 1st of the month following 90 days (Min hrs 25/wk)
LTD - 1st of the month following 365 days (Min hrs 25/wk)

Class: Life – Not Classed out
LTD - Class 1 – Management, Grades 33 & above
LTD – Class 2 – Non-Management

- Cont'd p. 2 -

PLAN ANALYSTS

1 Independent Dr. • Suite 3125 • Jacksonville, FL 32202 • (904) 354-8989 • FAX (904) 830-4862

• EXCELLENCE IN EMPLOYEE BENEFITS •

CURRENT BENEFITS:

LTD Plan:

Elimination Period: 180 days
Monthly Benefit: 66.67% / \$10,000 Max
Length of Benefit: Age 65, Reducing Benefit Duration
Own Occ: 65/24 (Class 1) & 24 mths (Class 2) **
Partial Disability: Zero day residual
Contribution: Non-Contributory
Current Rates: \$0.195 / 100
Renewal Rates: TBD
Carrier: Hartford since 2014
(Lincoln from 2002 – 2014)

Class 1: managers have own occ definition to SSNRA

Class 2: others have own occ 24 months

Life: Flat \$30,000

<u>Rates</u>	<u>Current</u>	<u>Renewal</u>
Basic Life:	\$0.09 / 1,000	TBD
Basic AD&D:	\$0.02 / 1,000	TBD
Contribution:	Non-Contributory	

Renewal Date: January 1, 2017

Provide Quotes By: August 22, 2016

Commission: Flat 15%

Disclaimer requirement: Please disclose any plan differences whether positive or negative.

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.

- End -
See Attachments (8)

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• EXCELLENCE IN EMPLOYEE BENEFITS •

Confirmation of Receipt

_____ Page(s) Including this page.

To: Lisa Girgis
Email: lgirgis@plananalysts.com
Co/Dept: Plan Analysts, Inc.
Re: **Intuition – LTD & Life RFP**

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

1. I have received the request for proposal for Intuition
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 solicit Intuition 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