



From: Leah Bohannon for Luke O'Steen

Date: July 20, 2022

RE: The Yerba Mate Co. (Previously PEO Pro Services, Inc.)
**Bid Request: Group STD, LTD, Basic Life & AD&D, Vol Life & AD&D,
Dental and Vision**
Renewal Date: 12/1/2022

Please immediately complete and return by fax, the attached "**Confirmation of Receipt.**"

Please provide a Group STD, LTD, Basic Life, Voluntary Life & AD&D, Dental and Vision for our client, The Yerba Mate Co. They are a longtime company and headquartered in Jacksonville with just under 400 employees. This company delivers products produced by Guayaki across the US.

You will see that I have attached two separate census, one for The Yerba Mate Co and a separate census for Guayaki. Since there is common ownership between these two companies, we would like to see a proposal for The Yerba Mate Co by itself, and another proposal that includes the employees of Guayaki.

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 for both The Yerba Mate Co and separate
Census for Guayaki
LTD & STD – Policy Comparison Form (Must be
completed by you)
Current Benefit Summaries

Full-time: 40 hours per week

Current Carrier: UNUM

Plan Analysts, Inc.
4811 Beach Blvd. #433, Jacksonville, FL 32207
904-354-8989

EE Contrib. Mo:		
EE	.00	2.66
ES	5.81	23.76
EC	7.07	13.10
EF	14.36	11.12

Life & AD&D	Renewal Date: 12/1	Lives: 403
Carrier: UNUM	Policy #: 0703719	Mo. Prem. \$4,178 Term: 11/30/2022
Plan:	Group Term Life & AD&D	
Benefit:	1xSalary up to \$100,000	
Rates:	Life 0.19 / 1000	
	AD&D 0.03/ 1000	

ER Contrib: 100%

Vol. Life & AD&D	Renewal Date: 12/1/2021	Lives: 89
Carrier: UNUM	Policy #: 0703720	Mo. Prem. \$1,927 Term: 11/30/2022

Plan Design:

EE (102)	10,000 up to 5x your base annual earnings (GI \$100000)
SP (26)	100% of the employee amount up to 500,000 (GI \$30000)
CH (17)	10,000

ER Contrib: 0%

For Disability: This group has employees located in California, New York, New Jersey

STD	Renewal Date: 12/1/2021	Lives: 117
Carrier: UNUM	Policy #: 0703809	Mo. Prem. \$2,154 Term: 11/30/2022

Plan Design: 14 / 14 up to 11 weeks at 60% of pre-disability earnings up to \$1,500 weekly
Rate: Table Rates / 10

ER Contrib: \$0.00

LTD	Renewal Date: 12/1	Lives: 98
Carrier: UNUM	Policy #: 0703809	Mo. Prem. \$1.752 Term: 11/30/2022

Plan Design: 90 day WP to age 65 60% pre-disability to \$12,000 per month
Rate: Table Rates/ 10

ER Contrib: \$0.00

Renewal Date: 12/01/2022

Provide Quotes By: 9/15/2022

Commission: Flat 12%

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.

Confirmation of Receipt

To: Leah Bohannon
Email: lbohannon@plananalysts.com
Company: Plan Analysts, Inc.
Re: **The Yerba Mate Co. – Dental, Vision, STD, LTD, Basic Life & ADD, Vol Life & ADD RFP**

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

1. I have received the request for proposal for **The Yerba Mate Co.**
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 PEO Pro Services 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:

Plan Analysts, Inc.
4811 Beach Blvd. #433, Jacksonville, FL 32207
904-354-8989

Name: _____
Phone: _____ Fax: _____
E-mail: _____ Dept: _____

Plan Analysts, Inc.
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904-354-8989