
Request for Proposal (RFP) Checklist

- ✓ Group name, industry, address, effective date
- ✓ Current/renewal rates
- ✓ Name of in-force carrier
- ✓ Current/proposed TPA and PPO
- ✓ 18 months of monthly paid claims and enrollment data with corresponding individual large claims data* -or- current and prior year aggregate and 50% reporting, if the group is currently self-funded
- ✓ Excel census including gender, date of birth, coverage code, zip code and waiver reason
- ✓ Current and proposed schedule of benefits
- ✓ Current and proposed commission level
- ✓ Desired specific deductible levels, contract basis
- ✓ Proposal due date
- ✓ Any additional details regarding the case characteristics that would be helpful during the underwriting process

***Note: If claims data is not available, BRM can quote up to 150 lives pending IMQs.**



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