

HELPFUL HINTS FOR RFP SUBMISSIONS

GENERAL GROUP INFORMATION – we recommend you use the RBG Request for Proposal Form for [Small Group](#) or [Large Group](#) (download forms to your desktop prior to use). These forms are designed to prompt you for required information for a quick quote turnaround. Please be sure to include:

- Group Name and Headquarters address.
- SIC Code and/or Nature of Business – required for ancillary marketing. Note – we will look up the group in DNBi to confirm the SIC code, however not all groups are listed in DNBi.
- Current carrier(s) and plan information for all lines RBG is quoting (see back up items below).
- Employer contribution for each line quoting. Do they use a base plan? If yes, include the base plan information.
- Census (in Excel) – a complete and accurate census helps reduce pending questions and allows a more efficient turnaround. Download the [RBG Census Template](#) which is inclusive for all lines of coverage
- Brief quoting Instructions or directions (i.e. benchmark, base plan analysis, virgin group – quote Gold and Silver options, client needs to reduce costs by 10%, etc)
- Send request and supporting materials to your RBG location:

[Los Angeles](#) [Sacramento](#) [San Diego](#) [San Jose](#)

BACK UP ITEMS, PER LINE OF COVERAGE:

MEDICAL:

- Current Invoice
- Current Renewal (or prior renewal if current is not available)
- Benefit summary(s) if current plan is not a standard CA small group plan (i.e. coming from large group, coming off a PEO, etc).
- Rates if current plan is not a standard CA small group plan

DENTAL AND VISION:

- Benefit Summary(s)
- Renewal letter and/or current and renewal rates
- Current Invoice

BASIC LIFE/AD&D, STD AND LTD:

- Benefit Summary(s)
- Class definitions if any of the benefits are classed
- Renewal letter and/or current and renewal rates
- Current Invoice

VOLUNTARY LIFE

- Benefit summary
- Current Invoice and/or volumes for employees with coverage currently
- Renewal letter and/or current and renewal rates

Please note – if discrepancies exist between the census, invoice or renewal data; RBG will default to the census data prevailing and will call out the discrepancies with the proposal delivery.