

BDG

the Benefits Design Group, LLC

Requests for Proposals Checklists (Group Insurance)

Small Group

(2 -50 Eligible Employees)

- Group Information Form
- Group Census Data
- Current Benefits Summaries
- Current and Renewal Rates

Large Group

(51+ Eligible Employees)

- Group Information Form
- Employer Additional Questionnaire for 51+
- Group Census Data
- Current Benefits Summaries
- Current and Renewal Rates
- Last 18-24 Months of Claims History
- Any Large Claim/Shock Loss Details