Allen Financial Group

Employee Benefits Proposal Request

Allen Financial Group would like to help you establish a comprehensive group insurance plan that meets your requirements in plan design and cost. In order to ensure accurate and equal proposals from the insurance carriers, please tell us about your business:

1. What is your company name? _____
2. Address _____
3. Phone/Fax _____
4. Primary contact/ E-Mail Address _____
5. Decision Maker _____
6. How many full-time employees? _____
7. What insurance company do you use for your plan now? _____
8. What type of business do you do? _____
9. What month would you like your coverage to begin? _____

Please tell us about the people who work for you.

	Name	Sex	Date of Birth	ZipCode	# of children	Family Status*	Hire Date	Salary
1								
2								
3								
4								
5								
6								
7								
8								
9								

(Please attach a separate listing if you have more than 9 employees)

***E-Employee; E,S-Employee & Spouse; E,C-Employee & Child; E,S,C-Full Family**

After this information is received, we will solicit your proposals. Insurers will typically provide the proposal within a week. When all bids are received, AFG will prepare an analysis for your review. After the analysis meeting, when you have decided upon a carrier and plan design, employee meetings will be held. This may take one to two weeks, and should be completed prior to the plan effective date. We will work with you to ensure your employees have a thorough understanding of their benefits. Our goal is to have your employees appreciate the value of this plan and to use it to their maximum advantage.

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