



Materials & Information

needed to obtain quotes

We at **Employee Benefits Incorporated (EBI)** thank you for the opportunity of being of service to your company. Once we have received the materials requested we will obtain quotes for you as quickly as possible. Typically this process requires two to three weeks to receive the data back from the providers and prepare it in a format that facilitates a fair comparison to your current rates and benefits.

✓ **A current census**

This should include name, age, sex, and dependent status of all your employees. Employees that have not yet satisfied their probationary period and COBRA's should also be included.

✓ **Current and renewal rates**

The current rates allow other providers the opportunity of analyzing your plan and its costs relative to how they think you should be priced. The renewal rates (if known) give them additional information in arriving at the best possible cost figure for the coverage requested.

✓ **Booklets or Summary of Benefits**

The booklet gives us *exactly* what your current plan provides. In providing alternatives to your coverage we want to match as closely as possible your current plan design. Having the booklet insures that no benefit is overlooked.

✓ **Authorization Letter**

The authorization letter empowers us to obtain quotes on your behalf. Some providers will provide quotes without requiring this, others will not respond to





us without it. *This letter does not effect your current broker affiliation.* Please copy this onto your letterhead.