



Information Needed to Provide a Proposal

1. Identify what your needs are.

	Priority				
	Low				High
Improving your payroll processing	1	2	3	4	5
Integrating HR, benefits, and payroll	1	2	3	4	5
Reducing employee liabilities	1	2	3	4	5
Reducing employee administration	1	2	3	4	5
Improving employee productivity	1	2	3	4	5
Reducing employee turnover	1	2	3	4	5
Recruiting better employees	1	2	3	4	5
Adding voluntary employee benefits	1	2	3	4	5
Offer / enhance 401(K) plan	1	2	3	4	5
Add section 125-cafeteria plan	1	2	3	4	5
Developing / updating employee Handbooks & personnel policies	1	2	3	4	5

2. Complete the census form.

3. Complete the application.

4. Workers' compensation declaration page of your policy.

5. Workers' compensation loss runs for the last 3 years.

6. Latest medical billing statement and outline of benefits.

7. Make sure to sign and answer the questions on the medical section on the application.

8. State unemployment reports for the last 4 quarters or if currently using a PEO, provide a copy of their last invoice.

Would you like us to evaluate your other business insurance needs? () yes () no

Comments _____

