



<b>Agent information</b>	
<b>Agent Name</b>	
<b>Agent Phone Number</b>	
<b>Agent E-mail</b>	
<b>Client information</b>	
<b>Client's Name</b>	
<b>Client's Address</b>	
<b>Client's City</b>	
<b>Client's State</b>	
<b>Client's Zip Code</b>	
<b>Effective Date</b>	
<b>Type of business</b>	
<b>SIC</b>	
<b># of Full Time Employees</b>	
<b>ATNE</b>	
<b># of Locations</b>	
<b>What is the client's budget?</b>	
<b>Plan Design</b>	
<b>Have they had insurance previously?</b>	
<b>Type?</b>	
<b>with who?</b>	
<b>Have they ever worked with a Broker?</b>	
<b>Are they currently working with a Broker? Who?</b>	
<b>Do they currently have insurance? (Then see below) (Y/N)</b>	

<b>IF YES</b>	
<b>Why are they looking for coverage?</b>	
<b>Current Carrier</b>	
<b>HSA (Y/N)</b>	
<b>HRA (Y/N)</b>	
<b>Number of plans offered</b>	
<b>Current rates and renewal rate</b>	
<b>Copays</b>	
<b>OOP</b>	
<b>Deductible</b>	
<b>Community or age banded premiums?</b>	
<b>% paid by Employee and % paid by Employer</b>	
<b># of Employees enrolled</b>	
<b>IF NO</b>	
<b>Why are they looking into health insurance now for their group?</b>	
<b>Preferred Copays</b>	
<b>Preferred OOP</b>	
<b>Preferred Deductible</b>	
<b>Preferred Copays</b>	
<b>Have they considered a budget for monthly premiums?</b>	
<b>Do they offer life and/or disability?</b>	
<b>Would they like quotes ?</b>	
<b>Would they like to present voluntary employee paid dental, vision, or other to offset out of pocket costs? (Y/N - Which?)</b>	
<b>Preferred Carriers to quote</b>	
<b>Carriers to avoid</b>	
<b>Notes:</b>	