

# 2017 Indication Request Worksheet

**This completed worksheet, most recent renewal and any available claims data is required with each RFP.**

*Pareto will release an employer-specific conceptual indication based on the information provided. The indication is not an offer to provide insurance or to participate in a captive. Once an employer understands the concept and makes the decision to move forward, a formal quote is requested from the carrier. Email [rfo@paretocaptive.com](mailto:rfo@paretocaptive.com) with all requests. Allow a 1-2 week turnaround.*

Brokerage Firm:

Primary Contact and Title:

Name of Employer:

Company Headquarters (City/State):

Industry and SIC Code:

Which best identifies your employer contact (CEO, CFO, HR, etc.):

Current Carrier/Funding Arrangement (Eg: BCBS/Fully Insured):

Is the group 100% Community Rated (experience does not impact their renewal terms):

Natural Renewal Date:

Proposed Effective Date:

Total Number of Enrolled Employees (Min. of 50 enrolled):

Total Number of Eligible Employees:

Desired TPA/Network:

Current (Annualized) Premium (Health/RX):

Renewal (Annualized) Premium (Health/RX):

If renewal is not available, please provide the anticipated renewal increase: %

Is the employer aware of any large/ongoing claim(s)?  Yes  No

If yes, please provide details:

Does the employers have \$5m or more in assets (not equity)?  Yes  No

Is the company privately held?  Yes  No

Type of Ownership (i.e. Active Ownership, Outside Investors, Partnership, Non-Profit, Municipality, etc.):

Is the employer a current or prospective client of yours:  Current Client  Prospective Client

Current/Desired Annual Compensation:

**Pareto now provides two aggregate policy options. Please check the preferred contract type:**

12/12 Aggregate Policy with 3 months of TLO (renewing into a 24/12); this policy will typically create a first year maximum cost of approximately 103-105% of the fully-insured renewal premium.

12/18 Aggregate Policy; this policy will typically create a first year maximum cost of approximately 114-116% of the fully-insured renewal premium.

*Please note that the 12/12 is only available through certain TPAs and requires slightly higher cost-containment efforts. Specific stop loss will be issued on a 12/18 basis regardless of aggregate policy choice.*

Additional Notes:

