

***Aita & Associates***  
**7005 Hazel Cotter Court #G3 Sebastopol, CA 95472**

***PROPOSAL REQUEST DATED: \_\_\_\_\_***

1. **Group Name:** \_\_\_\_\_ **Effective Date:** \_\_\_\_\_
2. **Address** \_\_\_\_\_ **City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_
3. **Contact Person:** \_\_\_\_\_ **Title:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Fax :** \_\_\_\_\_
4. **# of Employees:** \_\_\_\_\_ **Eligible Employees** \_\_\_\_\_ **Out-of-State employees** \_\_\_\_\_
5. **Type of Business:** \_\_\_\_\_ **SIC code** \_\_\_\_\_
6. **Current Carrier:** \_\_\_\_\_ **#Years:** \_\_\_\_\_ **Renewal date:** \_\_\_\_\_
7. **Prior Carrier:** \_\_\_\_\_ **8. # of Carriers in Last 5 Years** \_\_\_\_\_
9. **Current Benefits:** PPO / Indemnity: Co-Insurance \_\_\_\_\_ % / \_\_\_\_\_ %, HMO Plan: \_\_\_\_\_  
Office co-pay, \$ \_\_\_\_\_ Rx co-pay, \$ \_\_\_\_\_ Hospital co-pay, \$ \_\_\_\_\_  
Other benefits: (i.e. vision, chiropractic, DME, etc.) \_\_\_\_\_  
**Current Rates :** Single \$ \_\_\_\_\_ two party \$ \_\_\_\_\_ child \$ \_\_\_\_\_ Family \$ \_\_\_\_\_  
**Monthly Medical Premium** \$ \_\_\_\_\_ **Mo. Dental Premium** \$ \_\_\_\_\_
10. **Dental Benefits:** Deductible, \$ \_\_\_\_\_ Insurance % \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Max benefit. \$ \_\_\_\_\_  
**Dental Rates:** Single \_\_\_\_\_ two party \_\_\_\_\_ child \_\_\_\_\_ family \_\_\_\_\_
11. Has your group had any medical claims exceeding \$10,000 in Last 12 months: \_\_\_\_\_
12. Do you have any employees in the following categories:  
Disabilities: Yes \_\_\_ No \_\_\_ **13. Maternities:** Yes \_\_\_ No \_\_\_ **14. COBRA:** Yes \_\_\_ No \_\_\_
15. **Employer's Contribution** towards premium for: Employee \_\_\_\_\_ % Dependent(s): \_\_\_\_\_ %
16. Employee eligibility waiting period: 30 \_\_\_\_\_ 60 \_\_\_\_\_ 90 \_\_\_\_\_ 180 \_\_\_\_\_ 365 \_\_\_\_\_ Days
17. We have a Sec. 125 Premium only Plan: Yes \_\_\_\_\_ No \_\_\_\_\_ Interested \_\_\_\_\_
18. **Comments:** \_\_\_\_\_

**NOTE:** Questions? Call Nancy Aita: (707) 829-8606, (888) 829-8606, Fax: (707) 829-8924

e-mail: [nancy@aitaandassociates.com](mailto:nancy@aitaandassociates.com)