

September 9, 2021

REQUEST FOR PROPOSAL: EMPLOYEE BENEFIT BROKER/CONSULTING SERVICES

SER National is seeking written proposals for an insurance brokerage firm to provide Employee Benefit Brokerage and Consulting services related to SER National. Technical questions or requests

2.4. Late Submissions

Proposals not received prior to the date and time specified will not be considered and will be returned to the proposer unopened.

2.5. Acceptance/Rejection of Submittal

SER National reserves the right to reject any or all responses to this RFP, to waive minor irregularities in any proposal or in the RFP procedures, and to accept any proposal presented which meets or exceeds these specifications and which is deemed to be in the best interests of the SER National. However, the requirements for timelines shall not be waived.

2.6. Proposal Evaluation

A committee of individuals representing SER National will perform the evaluation of all proposals. Following this evaluation process, the committee may elect to ask certain respondents to complete an oral interview before the committee. The purpose of the interview is to allow those further selected firms expansion and discussion of their written responses.

2.7. Oral Interviews

Oral interviews are provided at the sole discretion of SER National and are for the purposes of allowing SER National to broaden their understanding of certain selected respondents.

2.8. Final Broker Selection

The final selection of the successful respondent(s) is scheduled to be completed by **October 15, 2021**. The successful respondent will assume their responsibilities on **October 18, 2021**.

3. MINIMUM QUALIFICATIONS

All brokerage firms submitting a proposal must:

- a. Be licensed to do business in all states SER National operates in. Currently, those states are Texas, California, Colorado, Kansas, Michigan, Missouri, New Mexico, Wisconsin, and D.C. More state may be added later.
- b. Have the expertise, licenses and resources to provide Employee Benefit broker/consulting services for SER National's current and future operations,
- c. Consistently maintain and allocate sufficient staffing resources to provide timely service for SER National's Employee Benefit broker/consulting services needs,
- d. Maintain staff that are qualified and available to provide specialized technical expertise in various disciplines as necessary.
- e. Ability to onboard through web portals (paperless).
- f. Currently holding of Errors & Omissions insurance.

g. Currently in good standing with national or state professional associations, holding

2. Account Team Qualifications

- a) Provide an overview of the account team that would be assigned to SER National. For each member of the team, provide highlights outlining qualifications and experience. Provide a summary of roles and distribution of responsibilities.

3. Clients

- a) Describe at least two innovative strategic solutions you have implemented for clients similar to SER National that highlight your benefits consulting expertise.
- b) Describe your internal mechanism for ensuring customer satisfaction with your services.