



# Welcome to

## Employee Benefits at Resource Brokerage

### Ten Questions to Ask Your Prospective Clients

1. Who is your current carrier?
2. What were the reasons you are shopping carriers?
  - Service?
  - Claims?
  - Rates?
  - Plan design options?
  - Were there things you particularly liked or disliked?
3. Have you ever had extraordinarily good or bad experiences with any particular carrier?
4. Is there a top end budget we need to stick to?
5. How many brokers have you worked with in the past 5 years?
  - Did your broker go to market at the time of the last renewal?
6. Which carriers did your current broker show the last time the plan was marketed?
  - Was there a particular reason you decided not to go with one of the carriers shown?
  - Would you be comfortable sharing any presented spreadsheets or market research so I don't come back with the same recommendations?
7. Is there any type of plans would you like to see or avoid or that you are particularly interested in (i.e. PPO, HMO, HSA, HRA, Tiered Networks, Reference Based Pricing)?



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8. Is your current broker providing any specific service that you particularly appreciate?
  - COBRA/IL Continuation Administration
  - Employee enrollment portal (i.e. Employee Navigator, EASE, Bernie Portal)
  - Employee maintenance (i.e. Adds, Deletes, Changes)
  
9. Do you currently offer any ancillary coverages?
  - Dental
  - Vision
  - Life
  - STD/LTD
  
10. If I do a full market search and come back to you with proof that your current plan is indeed your best option, would you consider allowing me the opportunity to represent you and your company with your current carrier?

Resource  
Brokerage, LLC  
AN INTEGRITY COMPANY