

REQUEST FOR PROPOSAL - PROPERTY INSURANCE
FORM 1 - BROKER/AGENT QUESTIONNAIRE

1. Explain your firm's ownership structure.

2. How many years has your firm been in business?

3. Describe the industry diversity of your firm's client base.

4. Describe the account team's expertise and experience in dealing with public sector coverage.

5. Describe the expertise and experience dealing with property insurance for clients with insured values in excess of two hundred million dollars of the account team proposing to place the requested insurance.

6. Identify the names and location of your proposed account service team that would actually service County's account. Describe each member's service role. Provide the qualifications of each member including title, role, education, tenure at firm, years of relevant experience, years and type of public sector experience. Who will the day-to-day contacts be for the account? (Attached separate sheet with this information.)

7. What are your top property insurance markets and what is your premium volume with each?

8. How long has your account team had a relationship with each of the markets noted above?

9. Describe the measures your firm takes to stay abreast of changes in the marketplace, i.e. fees, commissions, contingencies, insurer merger/acquisition, pricing trends, insurer solvency, etc.

10. Describe any capabilities your firm may have to enhance a client's risk management programs.

11. Provide an example of the skills and experience your firm has in designing or enhancing clients' property insurance programs.

12. Provide an example of a recommendation you have made to another client that brought additional value to the client's property insurance program.

**REQUEST FOR PROPOSAL
SHELBY COUNTY GOVERNMENT PROPERTY INSURANCE
FORM 2 - CERTIFICATION**

I certify that (insert name of firm) _____ did not obtain a commitment to underwrite the proposed insurance prior to the date of this Request For Proposals:

Insurance Company

SIGNATURE

NAME

TITLE

COMPANY

PHONE NUMBER

FAX NUMBER

E-MAIL ADDRESS

**REQUEST FOR PROPOSAL
SHELBY COUNTY GOVERNMENT PROPERTY INSURANCE
FORM 3 – PROPERTY INSURANCE PREMIUM PROPOSAL**

You may include your own proposal form but we request that you complete this sheet indicating basic information regarding the premium, rates and fees.

Brokerage fees/commissions shall be provided separately at the end of this form.

Estimated Total Annual Premium _____

Rate per \$100:

Property: _____ Mobile Equipment: _____

Other: _____

- This proposal conforms to County's current coverage; or
- This proposal deviates from County's current coverage as follows: (Attach separate sheets, if necessary)

Insurance Company: _____

Best's Rating for 2 most recent years _____

Are policy forms and endorsements attached? _____

Broker/Agent's Name: _____

Person with authority to bind coverage: _____

Signature: _____

Title: _____ Date: _____

Brokerage/Agent Fees or Commissions: _____

Brokerage fee shall include:

- Any basic commission negotiated with the insurers;
- Commission contingent on volume or profit
- Revenue/income arising from any other source.

Will your firm agree to provide this information in the future at each renewal? _____

Are there any financial ties between your firm and any of the insurers you are including in your proposal? If yes, please explain. _____

Is any aspect of your firm's business financed by an insurer? If yes, please explain.
