

**SHELBY COUNTY GOVERNMENT
REQUEST FOR PROPOSAL – BOILER AND MACHINERY/EQUIPMENT BREAKDOWN 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. Identify the names and location of your proposed account service team that would actually service County's account. Describe each member's service role and qualifications. Who will the day-to-day contacts be for the account? (Attached separate sheet with this information.)

 6. 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.

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

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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

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FORM 3 – 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.

Estimated Total Annual Premium including fees/commissions, etc:

Rate: _____

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

Insurance Company: _____

Best's Rating for 2 most recent years _____

Are policy forms and endorsements attached? _____

Broker/Agency Name, Address, phone, website:

Person with authority to bind coverage: _____

Signature: _____

Title: _____ **Date:** _____

Brokerage/Agent Fees or Commissions – included in total annual premium and rate above: _____

Fees and commissions shall include:

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

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. _____