

# AR Fact Finding Questionnaire

**Prospect Name:** \_\_\_\_\_

1. What Lines of Coverage Do You Offer?

- Medical       Dental       LTD       STD  
 AD&D       Life       Vision       Voluntary  
 Other

2. How Are You Funded?

- Self-Funded       Fully Insured

Medical Carrier: \_\_\_\_\_

Renewal Date: \_\_\_\_\_

## Broker Relationship:

3. What Broker/Agency Do You Currently Work With? \_\_\_\_\_

4. How Long Have You Been with Them? \_\_\_\_\_

5. Do You Regularly Have a Mid-Year Or Pre-Renewal Meeting? What Do You Find Valuable about This Meeting or Process?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. How Do You Keep Up-to-Date on the Following Items?

Benefits Legislation Updates: \_\_\_\_\_

Health Reform Updates: \_\_\_\_\_

Health Care Cost Management Strategies: \_\_\_\_\_

Health Care and Benefits Trends: \_\_\_\_\_

Carrier Administrative Changes: \_\_\_\_\_

Health Care Consumerism Issues: \_\_\_\_\_

Market Intelligence: \_\_\_\_\_

Employee Communication Tools: \_\_\_\_\_

Benchmark and Survey Results: \_\_\_\_\_

How Your Plan Compares to Other Similar Firms: \_\_\_\_\_

Wellness Implementation and Support: \_\_\_\_\_

HR Rules and Regulations: \_\_\_\_\_

Enrollment Resources: \_\_\_\_\_

Retirement Plan Obligations and Compliance: \_\_\_\_\_

7. Do You Develop a Short And Long Term Strategic Benefit Plan Each Year? \_\_\_\_\_

8. How Do You Administer the Annual Benefits Enrollment Process?

Paper

Carrier Website

Benefit Administration or Enrollment System

With Who? \_\_\_\_\_

If Not, Have You Ever Looked at one?: \_\_\_\_\_

Would You Like to Learn More about NIS Enroll? \_\_\_\_\_