

# Quote Request Form

## AGENT INFORMATION

Agent Name:

Agency Name:

Agent Email:

Agent Phone:

Select the Trovia Service Delivery Model (see back page):  Agency  Regional  National

Specify the desired advisory fee on a Per Subscriber (enrolled employee) Per Month Basis: \$

## EMPLOYER INFORMATION

Group Name:

Employer Tax ID Number:

Headquarters Address:

List all states employees are located in:

Does the group currently offer any health insurance?

YES  NO

If yes, please choose one:

GROUP  INDIVIDUAL

If group, provide electronic versions of the current:

- Summary of plan benefits
- Premium rates or equivalents
- Enrollment numbers (if multiple plans)

Number of Full-time Employees:

Requested Effective Date:

## EMPLOYEE CENSUS

Please provide the employee census in the precise file format attached. The information collected is required for individual and zip code level quoting.

Save the document as a MS-DOS.csv file before uploading to Nexben.

**NOTE:** The Employee ID number is for quoting purposes, each employee must have a unique identifier. If employee includes dependents, those dependents would share the employee's ID number.

## AFFORDABILITY TESTING

Does the group want to look at affordability testing?

YES  NO

If yes, is there a specific dollar amount or cap? Indicate here: \$

If yes, please provide each employee's hourly wage OR annual salary on the census.

Other special instructions or pertinent information:

When the group and census are loaded into Nexben, please send a copy of this form to [Proposals@trovia.com](mailto:Proposals@trovia.com) to request a quote.

## Trovia Service Delivery Model

	AGENCY	REGIONAL	NATIONAL
Description	<p>The Agency Model is designed for the selling agent to:</p> <ul style="list-style-type: none"> <li>• use their own licenses and carrier appointments</li> <li>• submit applications and provide service to the individual members of the group</li> <li>• serve as the Agent of Record</li> </ul>	<p>The Regional Model is designed for the selling agent who does not have the required licenses and carrier appointments.</p> <p>Nexben will use the Trovia Agency* to:</p> <ul style="list-style-type: none"> <li>• submit applications and provide service to the individual members of the group</li> <li>• serve as the Agent of Record</li> </ul> <p><i>*Assuming Trovia Agency has all the required license and carrier appointments</i></p>	<p>Nexben has partnered with Health Markets for their exceptional, individual service and nationwide licenses and carrier appointments.</p> <p>The National Model is designed to have Health Market's agents:</p> <ul style="list-style-type: none"> <li>• partner with individual members of the group to ensure a satisfying enrollment process</li> <li>• provide expert benefit consultation</li> </ul>
Compensation	<p>Selling agent serves as the Agent of Record and will receive all carrier commissions</p> <p>Nexben receives the \$20 PSPM administrative fee to support enrollment and ongoing payments to carriers</p>	<p>Trovia Agency serves as the Agent of Record and will receive all carrier commissions</p> <p>Selling agent may add a broker consulting fee</p> <p>Nexben receives the \$20 PSPM administrative fee to support enrollment and ongoing payments to carriers</p>	<p>Health Markets serves as the Agent of Record and will receive all carrier commissions</p> <p>Selling agent may add a broker consulting fee</p> <p>Nexben receives the \$20 PSPM administrative fee to support enrollment and ongoing payments to carriers</p>
Expectations	<p>Selling Agent:</p> <ul style="list-style-type: none"> <li>• primary support to both the employer group and individual employees</li> <li>• submits all carrier applications via paper app, broker portal, or other means</li> <li>• supports the annual renewal process</li> <li>• is the Agent of Record for all policies</li> </ul>	<p>Selling Agent:</p> <ul style="list-style-type: none"> <li>• primary source of contact for the employer group</li> </ul> <p>Trovia Agency:</p> <ul style="list-style-type: none"> <li>• provides service for individual employees</li> <li>• submits carrier applications for those carriers with whom they have appointments</li> <li>• supports the annual renewal process</li> <li>• is the Agent of Record for all policies</li> </ul>	<p>Selling Agent:</p> <ul style="list-style-type: none"> <li>• primary source of contact for the employer group</li> </ul> <p>Health Markets:</p> <ul style="list-style-type: none"> <li>• provides service for individual employees, including outbound calls to support enrollment</li> <li>• offers options for on-site enrollment support</li> <li>• submits all carrier applications</li> <li>• supports the annual renewal process</li> <li>• is the Agent of Record for all policies</li> </ul>

Trovia is built to support all three service delivery models. To provide the best possible experience and guarantee success only one delivery model may be used per group. Have questions or need support, simplify your world and let us help — [1-877-4-TROVIA](tel:1-877-4-TROVIA).

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