



GOODWIN BENEFITS GROUP LLC SCOPE OF SERVICES CHECKLIST

	<u>YOUR FIRM</u>	<u>GBG</u>
I. AUDIT AND REVIEW CURRENT PLANS		
A. Prepare report analyzing current plan(s)	<input type="checkbox"/>	✓
1. Review current plan	<input type="checkbox"/>	✓
2. Recommendations	<input type="checkbox"/>	✓
B. Develop long-range plans and objectives	<input type="checkbox"/>	✓
II. PLAN DESIGN AND RATE NEGOTIATION		
A. Discuss strategy for renewal 180 - 150 days in advance	<input type="checkbox"/>	✓
B. Request renewal rates from carrier at least 90 days in advance of anniversary date	<input type="checkbox"/>	✓
C. Negotiate renewal rates with carrier	<input type="checkbox"/>	✓
D. Evaluate alternative plan design options	<input type="checkbox"/>	✓
III. COMPETITIVE BIDDING		
A. When feasible, draft bid specifications	<input type="checkbox"/>	✓
B. Analyze bid responses	<input type="checkbox"/>	✓
C. Evaluate alternative funding options	<input type="checkbox"/>	✓
IV. IMPLEMENTATION		
A. Implementation meeting	<input type="checkbox"/>	✓
B. Complete all documents and contracts	<input type="checkbox"/>	✓
C. Order Certificates of Coverage and ID cards	<input type="checkbox"/>	✓
V. EMPLOYEE COMMUNICATIONS		
A. Coordinate open enrollment meetings	<input type="checkbox"/>	✓
B. Design announcement letters and benefit outline summaries	<input type="checkbox"/>	✓
C. Answer employee questions	<input type="checkbox"/>	✓
VI. ONGOING MANAGEMENT SERVICE		
A. Assist employees with claim questions and problems	<input type="checkbox"/>	✓
B. Assist with billing, enrollment card, ID cards, etc.	<input type="checkbox"/>	✓
C. Develop and coordinate enrollment materials for new employees	<input type="checkbox"/>	✓
D. Assist and service 401(k) & 125 Cafeteria Plan management needs	<input type="checkbox"/>	✓
VII. LEGISLATIVE ISSUES		
A. Provide easy to use reference relating to compliance obligations	<input type="checkbox"/>	✓
B. Assist with federal and state requirements (ERISA, COBRA, HIPAA)	<input type="checkbox"/>	✓
C. Provide updates on pending legislative issues	<input type="checkbox"/>	✓
D. Review summary plan descriptions and annual filings	<input type="checkbox"/>	✓
VIII. PLAN MANAGEMENT		
A. Review quarterly claims experience reports (if available)	<input type="checkbox"/>	✓
B. Evaluate and recommend future welfare plan options	<input type="checkbox"/>	✓
C. Evaluate and recommend future retirement plan options	<input type="checkbox"/>	✓
D. Coordinate Section 125 (Cafeteria Plan), Section 105 (Health Reimbursement Arrangement) and Section 223 (Health Savings Account) options	<input type="checkbox"/>	✓
E. Coordinate all benefit plans into a comprehensive package	<input type="checkbox"/>	✓