

## Fee Proposals RFP 17-015 - Agent of Record - Employee Benefits - Page 1 of 2

### TWO YEAR OPTION

| Company Name  | USI               | Gallagher Benefit Services, Inc. | Seacrest Partners | Capstone   | EPIC          |
|---|-------------------|----------------------------------|-------------------|--|---------------|
| Flat Fee (COMPLETE) – Year One – attach complete listing of all services that are included in this fee. | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$11,750.00 paid each month - \$141,000.00 annually  | \$147,000.00  |
| <i>Discount offered – Year One of two years</i>   | <i>\$0.00</i>     | <i>\$0.00</i>                    | <i>\$0.00</i>     | <i>\$7,050.00</i>                                    | <i>\$0.00</i> |
| Flat Fee (COMPLETE) – Year One with discount  | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$66,975.00 paid semi annually \$133,950.00 annually | \$147,000.00  |
| Flat Fee (COMPLETE) – Year Two - attach complete listing of all services that are included in this fee. | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$11,750.00 paid each month - \$141,000.00 annually  | \$147,000.00  |
| <i>Discount offered – Year Two of two years</i>   | <i>\$4,500.00</i> | <i>\$0.00</i>                    | <i>\$0.00</i>     | <i>\$7,050.00</i>                                    | <i>\$0.00</i> |
| Flat Fee (COMPLETE) – Year Two with discount  | \$40,500.00       | \$65,000.00                      | \$70,000.00       | \$66,975.00 paid semi annually \$133,950.00 annually | \$147,000.00  |

### THREE YEAR OPTION

| Company Name  | USI               | Gallagher Benefit Services, Inc. | Seacrest Partners | Capstone   | EPIC          |
|---|-------------------|----------------------------------|-------------------|--|---------------|
| Flat Fee (COMPLETE) – Year One – attach complete listing of all services that are included in this fee.   | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$10,750.00 paid each month - \$129,000.00 annually  | \$147,000.00  |
| <i>Discount offered – Year One of three years</i>   | <i>\$0.00</i>     | <i>\$0.00</i>                    | <i>\$0.00</i>     | <i>\$6,450.00</i>                                    | <i>\$0.00</i> |
| Flat Fee (COMPLETE) – Year One with discount  | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$61,275.00 paid semi annually \$122,550.00 annually | \$147,000.00  |
| Flat Fee (COMPLETE) – Year Two - attach complete listing of all services that are included in this fee.   | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$10,750.00 paid each month - \$129,000.00 annually  | \$147,000.00  |
| <i>Discount offered – Year Two of three years</i>   | <i>\$4,500.00</i> | <i>\$0.00</i>                    | <i>\$0.00</i>     | <i>\$6,450.00</i>                                    | <i>\$0.00</i> |
| Flat Fee (COMPLETE) – Year Two with discount  | \$40,500.00       | \$65,000.00                      | \$70,000.00       | \$61,275.00 paid semi annually \$122,550.00 annually | \$147,000.00  |
| Flat Fee (COMPLETE) – Year Three - attach complete listing of all services that are included in this fee. | \$45,000.00       | \$65,000.00                      | \$70,000.00       | \$10,750.00 paid each month - \$129,000.00 annually  | \$147,000.00  |
| <i>Discount offered – Year Three of three years</i>   | <i>\$4,500.00</i> | <i>\$0.00</i>                    | <i>\$0.00</i>     | <i>\$6,450.00</i>                                    | <i>\$0.00</i> |
| Flat Fee (COMPLETE) – Year Three with discount  | \$40,500.00       | \$65,000.00                      | \$70,000.00       | \$61,275.00 paid semi annually \$122,550.00 annually | \$147,000.00  |

## Fee Proposals RFP 17-015 - Agent of Record - Employee Benefits - Page 2 of 2

### TWO YEAR OPTION

| Company Name  | Shaw Hankins                                 | MSI           |
|---|--|---------------|
| Flat Fee (COMPLETE) – Year One – attach complete listing of all services that are included in this fee. | \$86,250.00 (\$250.00 per employee per year) | \$20.27 PCEPM |
| <i>Discount offered – Year One of two years</i>   | <i>NONE</i>                                  | <i>N/A</i>    |
| Flat Fee (COMPLETE) – Year One with discount  | \$86,250.00 (\$250.00 per employee per year) | \$20.27 PCEPM |
| Flat Fee (COMPLETE) – Year Two - attach complete listing of all services that are included in this fee. | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |
| <i>Discount offered – Year Two of two years</i>   | <i>\$10.00 per employee per year</i>         | <i>N/A</i>    |
| Flat Fee (COMPLETE) – Year Two with discount  | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |

### THREE YEAR OPTION

| Company Name  | Shaw Hankins                                 | MSI           |
|---|--|---------------|
| Flat Fee (COMPLETE) – Year One – attach complete listing of all services that are included in this fee.   | \$86,250.00 (\$250.00 per employee per year) | \$20.27 PCEPM |
| <i>Discount offered – Year One of three years</i>   | <i>NONE</i>                                  | <i>N/A</i>    |
| Flat Fee (COMPLETE) – Year One with discount  | \$86,250.00 (\$250.00 per employee per year) | \$20.27 PCEPM |
| Flat Fee (COMPLETE) – Year Two - attach complete listing of all services that are included in this fee.   | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |
| <i>Discount offered – Year Two of three years</i>   | <i>\$10.00 per employee per year</i>         | <i>N/A</i>    |
| Flat Fee (COMPLETE) – Year Two with discount  | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |
| Flat Fee (COMPLETE) – Year Three - attach complete listing of all services that are included in this fee. | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |
| <i>Discount offered – Year Three of three years</i>   | <i>\$10.00 per employee per year</i>         | <i>N/A</i>    |
| Flat Fee (COMPLETE) – Year Three with discount  | \$82,800.00 (\$240.00 per employee per year) | \$20.27 PCEPM |

An additional \$7.50 per employee per year would apply to ACA reporting services, to include IRS forms 1094-C & 1095-C