**BY THE GOVERNING BODY OF THE CITY OF OCEAN CITY, N.J.**

**PROPOSAL NAME:** Agent/Broker of Record for the City’s Employee Benefit Program

**SUMMARY OF RFP**

**DATE RECEIVED:** Tuesday, July 30, 2013 @ 2:00 PM, EDT

**CITY RFP #:** Q-13-010

**FOR:** City of Ocean City

**AMERICAN’S GREATEST FAMILY RESORT**

**PURCHASING DIVISION**

**NAME, ADDRESS & BID OF EACH BIDDER**

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alamo Insurance Group</td>
<td>8419 Bergenline Avenue, North Bergen, NJ 07047</td>
</tr>
<tr>
<td>Allen Associates</td>
<td>630 S. Brewster Road, Building C, Vineland, NJ 08361</td>
</tr>
<tr>
<td>Brown &amp; Brown Metro, Inc.</td>
<td>30A Ventrel Road, Linwood, NJ 08221</td>
</tr>
<tr>
<td>Hafetz and Associates</td>
<td>600 New Road, Egg Harbor Township, NJ 08234</td>
</tr>
<tr>
<td>Innovative Risk Solutions, Inc.</td>
<td>3330 Bargaintown Road, Suite 2, Linwood, NJ 08221</td>
</tr>
<tr>
<td>METLIFE Solutions Group</td>
<td>600 New Road, Roseland, NJ 07068</td>
</tr>
</tbody>
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**PROPOSED FEE:**

- No Cost to the City—Alamo is compensated by the carrier(s) and/or fund under their standard compensation terms for a fee not to exceed 2.75%
- Compensation is a flat 2% of all premiums rates paid to all carriers

**REQUIRED INFORMATION**

- RIGHT TO EXTEND TIME OF AWARD: YES/NO
- ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA: YES/NO
- STOCKHOLDER DISCLOSURE STATEMENT: YES/NO
- NON-COLLUSION AFFIDAVIT: YES/NO
- MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE: YES/NO
- AFFIRMATIVE ACTION REGULATION COMPLIANCE NOTICE: YES/NO
- SWORN STATEMENT BY PROFESSIONAL SERVICES PROVIDER: YES/NO
- BUSINESS REGISTRATION CERTIFICATE (BRC) SUBMITTED: YES/NO
- NUMBER OF COPIES SUBMITTED: 3

**CONTACT INFORMATION**

- Lois Lugo, Director of Operations: Ph: (201) 295-9044 ext. 210, email: tsmith@alamoinsurance.net
- Richard S. Allen, President: Ph: (856) 692-2250, email: Rich@allenassoc.com
- Kutay Beba, Executive Vice President: Ph: (973) 549-1877, email: tbeba@bbmetro.com
- Ben Newton, Group Benefits Consultant: Ph: (609) 872-0001, email: bnewton@srhafetz.com
- Joseph Abbahani, FSR: Ph: (609) 927-7475, email: jablahani@metlife.com
- Christopher DeMarco: Ph: (973) 618-2360, email: cdemarco@metlife.com
- Sean Gormley, President: Ph: (609) 927-7476, email: sean@irsteam.com
- Christopher DeMarco: Ph: (973) 618-2361, email: cdemarco@metlife.com

**PROPOSED FEE:**

- $85,000.00/year for a fee not to exceed 2.75%
- $25,000.00/year for a fee not to exceed 2.75%

**CONTINUE TO ACCOMPLISH THE FOLLOWING:**

- No additional broker commission charged
- Premium-$500K to $14M
- Self-Insured (per head)
- 3.00% Commission

**RATES PREFERRED TO ALL CARRIERS:**

- (Medical & Prescription) Continue to manage all other lines of coverage with no additional broker commission charged

**COMMISSION DETAILS:**

- No Cost to the City—Alamo is compensated by the carrier(s) and/or fund under their standard compensation terms for a fee not to exceed 2.75%
- Compensation is a flat 2% of all premiums rates paid to all carriers
- Continue to accept the current commission of 2% on all fully insured lines of coverage
- Premium-$500K to $14M
- Self-Insured (per head)
- 3.00% Commission
- Continue to manage all other lines of coverage with no additional broker commission charged