

General Information	
City and state of office	
Year the service office was established	
Annual service office revenues for past 3 years	
Brief description of core service team, day-to-day support for the account, other staff available and how your account team is different than your competitors.	
Describe your expertise in the healthcare industry	
Within the last 3 years or currently under investigation by a regulatory body?	
Limits of liability for PL and E&O insurance? (A satisfactory certificate of insurance will be required prior to contract execution)	
Involved in any E&O claim in past 3 years?	
Unrestricted appointments in place with any of the following carriers: BETA, Lloyd's Underwriters, AIG, Beazley, Golden Bear, Hudson, or HARPP?	

Client Service/Quality Assurance	
How does your firm evaluate the solvency and quality of insurers that may be used on our account?	
Describe the procedures for monitoring client satisfaction	
Describe your organization's commitment to quality	
What is your philosophy on customer services?	
Describe your service and response time standards	
Describe any Service Guarantees	

Services Provided	
Describe your marketing approach	
How will you ensure PMHD's programs are the most competitive?	
How will you keep PMHD informed of the best practices relating to insurance and risk management?	
Provide performance standards, such as timetables for renewals, COI issuance, etc.	
Provide a sample transition plan if selected as PMHD's new broker	

References	
Provide two references for companies of similar size, complexity and characteristics to PMHD	
Example of how your services have significantly benefited a client	

Compensation	
Describe our right to terminate the contract for broker services	
Three-year annual fee proposal (excluding fees for loss control services)	
Willing to offset fees with revenues from other sources?	
Willing to put some of your compensation at risk?	
What portion of your fee is "earned" if contract terminates early?	