

## Robert Hensley & Associates, LLC – Employee Benefits Service Agreement

### Sample Company Name

Robert Hensley & Associates, LLC, (RH&A) is pleased to provide Sample Company with this agreement. In our professional opinion, this type of agreement is essential in order for us to provide the support you expect from our firm during the policy year. Based on our experience, this formal commitment is unique, and as professionals, we believe it is fundamentally good business practice.

The following is a summary of our service commitment to Sample Company.

1. RH&A will be your primary contact on all policy correspondence, i.e., new employee enrollments, terminations, COBRA, billing and claims issues.
2. RH&A will promptly provide copies of plan summaries, enrollment forms, and provider directories upon your request.
3. RH&A will call Sample Company at least once every six months to check the status of your policy activity.
4. RH&A will use its best efforts to make recommendations on how your Group Benefits insurance program can be restructured to improve its efficiency or effectiveness.
  - (a) Annual reviews will be conducted 45 to 60 days in advance of your renewal date. A market survey will be provided to compare your existing plan with other carriers. Timing of renewal reviews is subject to change based on our date of receipt from the insurance companies.
  - (b) From time to time, clients can rely on RH&A to make policy recommendations based on industry trends.
5. RH&A will advise Sample Company promptly of any changes in Group Benefit Insurance policies mandated by the State Government or Industry policy.

We can maximize our effectiveness in serving Sample Company if you will use your best efforts to do the following:

1. Sample Company will advise RH&A of any employee status changes.
2. Sample Company will provide annual salary changes to RH&A for Group Life/A&D and Disability Benefits, if applicable.
3. To avoid a potential lapse and/or cancellation, Sample Company will pay their premium statements as billed. Any adjustments will be reflected on the following months invoice.

Acknowledged and accepted by:

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For RH&A

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For Sample Company