



June 28, 2018

To Whom It May Concern:

Thank you for allowing my office to help service the cancer insurance product and other insurance products that have been awarded to Puro Aseguro Inc in the past. I would like the opportunity to continue servicing Hidalgo County, for the Section 125 Voluntary Insurance Products. My office has partnered with Salazar Insurance Group in offering products and services that are advantageous to Hidalgo County.

For the past 30 years, I have been an insurance broker specializing in group health, life and other supplemental insurance products. For 20 years, I have been an agent for many school districts, municipalities and counties that have a voluntary insurance program.

Joe Salazar has been a broker for over 20 years, specializing in supplemental insurance products to large public-sector groups as well as Fortune 500 companies such as Southwest Airlines. His office has strategically handled groups with as many as 65 locations and has a leadership team of highly qualified agents who oversee his book of business.

We look forward to proposing very competitive voluntary insurance plan offerings, and *Employee Navigator*, an online enrollment and HR benefit system. As of January 2017, Employer Navigator had over 20,000 + employers, 3,000,000 + employees and \$8 billion in active premium.

Key highlights to Employee Navigator include streamlining core and voluntary benefits enrollment, electronic payroll interface, track EOIs and COBRA support, employee compliance triggers, self-service portals, track time-off, track onboard new hires, weekly EDI feeds to insurance carriers, store personnel records, HIPPA compliant, and ACA generating tools for 1094-C and 1095-C 2020 reporting.

This online enrollment and HR system will be at no cost to Hidalgo County or any other brokers who are awarded business during this RFP process. Hidalgo County will have a dedicated IT Specialist located in the Harlingen area who can build the County's enrollment system (core and voluntary products) in five (5) weeks and can continue meeting with County Benefit Department heads year-round to help the County customize and maximize all the capabilities Employee Navigator offers.

Please review our agency services that highlight our plan options to access Employee Navigator.

In the "Agent Services" section of the RFP, we have demonstrated our ability to meet the qualifications and service requirements set by Hidalgo County and we look forward to continuing to be a valuable partner.

Some key highlights to our services are the following:

- Provide licensed bilingual enrollers for all enrollment sites.
- Provide online enrollment system for core and voluntary products at no cost that meets the weekly EDI feeds requirement, excel billing, unmasked social security numbers for reconciling, self-enroll options, ACA options, and all other requirements set by the County
- Provide online enrollment system for sole products awarded to our agencies that meets the weekly EDI feeds requirement, excel billing, unmasked social security numbers for reconciling, and all other requirements set by the County
- Onsite benefit presentations and enrollment for new hires and current employees during the calendar year that accommodates the schedules of the department liaisons to ensure employees have access to the benefit program.
- Offer a 24-hour answering service and toll-free phone number.
- Dedicated account executive who will be the local support for claims, questions and any issue
- Assist of auditing initial bills post- open enrollment.
- Educate employees on key provisions of their plan during the year through fliers, brochures, on-site presentations, and emails.

Together, Puro Aseguro Inc and Salazar Insurance Group will deliver on our commitment in serving Hidalgo County with efficient, courteous and convenient service. We will strive in meeting our goals and exceeding all expectations in making the voluntary insurance program a huge success.

Thank you again for your valued trust in both of our agencies with our current product offering. We look forward to the opportunity of continued service.

Sincerely,



Robert Ramirez Jr.

Puro Aseguro Inc.
514 S. Veterans Blvd., Ste. A
Pharr, Texas 78577
(956) 783-1137 office
(956) 787-1927 fax
(956) 330-2282 mobile
rr@puroaseguro.com

REQUEST FOR PROPOSAL LEGAL NOTICE
for
HIDALGO COUNTY
"Section 125 Voluntary Insurance Products & COBRA Administration Services"
RFP No.: 2018-148-06-20-YZV

To: Martha L. Salazar, CPPB, Purchasing Agent
Hidalgo County Purchasing Department
Physical Address: 2802 S. Business Hwy. 281
Mailing/US Postal Address: 2812 S. Business Hwy. 281
Edinburg, Texas 78539

In accordance with the Requirements, and subject to all laws and regulations of the United States and state and local laws, the undersigned proposer proposes and commits to furnish all labor, equipment, material, software, and services as set forth in the documents hereinbefore mentioned. The undersigned proposer further agrees, upon acceptance of its proposal, to execute a contract and/or Purchase Order issued by Hidalgo County for performing and completing the work described in the Requirements within the time stated and for the prices proposed in the documents attached hereto and made a part hereof.

Proposer acknowledges receipt of all of the pages of the documents referenced in the Request for Proposal Checklist presented in connection with this procurement. Proposer understands that Hidalgo County reserves the right to reject any or all proposals and further reserves the right to design the evaluation criteria to be used in selecting the lowest and best proposal.

Proposer agrees that this proposal shall be good and may not be withdrawn for a period of ninety (90) calendar days after the scheduled closing time for receiving proposals, as contained in the Requirements.

Except for deviations as noted in the proposal submission.

Respectfully submitted,

FIRM: Sun Life Assurance Company of Canada

ADDRESS: One Sun Life Executive Park, Wellesley Hills, MA 02481

BY: 

PRINT

NAME: Michael A Evans

TITLE: AVP, LTD Benefits

SUN LIFE FINANCIAL
ONE SUN LIFE EXECUTIVE PARK
WELLESLEY HILLS, MA 02481

SC 1080
UNITED STATES OF AMERICA
BILL SENDER
TO
MARTHA SALAZAR
HIDALGO COUNTY
2812 S. BUSINESS HWY 281
ADMINISTRATION BUILDING
EDINBURG TX 78539
(855) 888-2812
REF: 31281



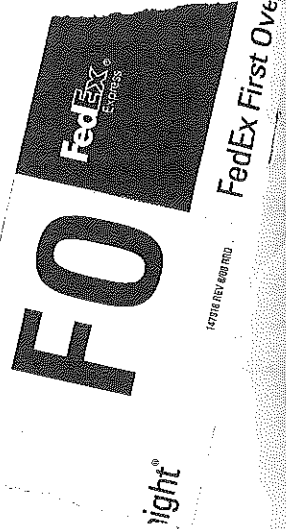
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RFP NO. : 2018-148-6-20-YZV-HIDALGO
COUNTY - SECTION 125 VOLUNTARY
INSURANCE PRODUCTS &
COBRA ADMINISTRATION SERVICES
PURCHASING DEPT.
2802 S. BUSINESS HWY 281



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 for
 HIDALGO COUNTY
"Section 125 Voluntary Insurance Products & COBRA Administration Services"
 RFP No.: 2018-148-06-20-YZV

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FIRM: Sun Life Assurance Company of Canada

ADDRESS: One Sun Life Executive Park, Wellesley Hills, MA 02481

BY: 

PRINT
 NAME: Michael A Evans

TITLE: AVP, LTD Benefits

AGENT INFORMATION :

SUBMIT THIS FORM WITH YOUR PROPOSAL

Hidalgo County requests the insurance company submit proposal(s) through one named agent selected by the insurance company. Please provide the following information for the agent selected by the insurance company. Hidalgo County will accept only one (1) agent per carrier. If multiple agents are used Hidalgo County reserves the right to disqualify your proposal submission. Please provide the following information for your selected agent.

a) Copy of Agents E & O Insurance certificate., ✓

b) Name/Address of agent: Cuevas + Associates L.L.C
11550 I-R 10 West #150
San Antonio, TX 78230
210-558-0811 x 212

c) Agent experience with insurance company (Length of association, number of groups, Premium generated):
5 years
5-7 groups

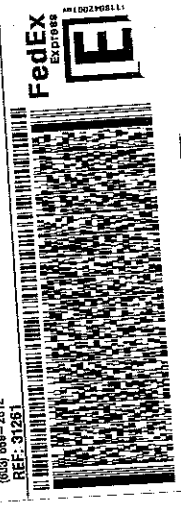
d) Will a "Hold Harmless Agreement" with provisions comparable to those presented in the RFP specifications be executed? Yes No. ✓

e) Selected agent must provide a brief outline of services and confirmation of acceptance of all service required by this RFP.

ORIGIN: IDLPRXA (781) 448-3334
SHIP DATE: 10 JUL 18
ACTWT: 30.75 LB
CAB: 014435Z/CFE3210
BILL SENDER

TO MARTHA SALAZAR
HIDALGO COUNTY
2812 S. BUSINESS HWY 281
ADMINISTRATION BUILDING
EDINBURG TX 78539

6600 097 2012
REF: 31281



WED

TRK# 7471 8606 4555
0201

SUN LIFE FINANCIAL
ONE SUN LIFE EXECUTIVE PARK
WELLESLEY HILLS, MA 02481



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Part # 160148-403 FRT EXP 11/18 3

RFP NO. : 2018-148-6-20-YZV-HIDALGO
COUNTY - SECTION 125 VOLUNTARY
INSURANCE PRODUCTS & COBRA
ADMINISTRATION
SERVICES
PURCHASING DEPT.
BUSINESS HWY 281