

State of Florida



## Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD  
TALLAHASSEE, FLORIDA 32399-0850

**-M-E-M-O-R-A-N-D-U-M-**

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**DATE:** January 31, 2018  
**TO:** Carlotta Stauffer, Commission Clerk, Office of Commission Clerk  
**FROM:** Curtis J. Williams, Office of Industry Development & Market Analysis *CW* *CA*  
**RE:** Docket No. 20140029-TP - Document Filing

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Please file the attached document from James Forstall regarding FTRI's GHP & Retirement Comparison Project in Docket No. 20140029-TP.

Please let me know if you have any questions.

Attachment

RECEIVED-FPSC  
2018 JAN 31 PM 3:25  
COMMISSION  
CLERK

## Curtis Williams

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**From:** James Forstall <jforstall@ftri.org>  
**Sent:** Wednesday, January 31, 2018 8:14 AM  
**To:** Cayce Hinton  
**Cc:** Curtis Williams; Carl Vinson; Brett Bascom; McCabe, Thomas M.  
**Subject:** FTRI GHP & Retirement Comparison Project  
**Attachments:** GHP & Retirement Comparison Chart 1.31.2018.pdf

Good Morning Cayce,

Attached please find a chart that reflects our work and findings on this project. We've met with two providers for GHP and are planning to meet with them again soon to obtain additional information. Also, we're planning to meet with an additional provider (date to be determined) to review their proposal for retirement. After I receive the requested additional information, I'll be able to provide you with a comparison chart.

Thanks

*James*

James Forstall, Executive Director  
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## DRAFT

### GHP and Retirement Quote Request

Some companies were unable to provide GHP (Group Health Plan) quotes during this current enrollment season and suggested beginning this process during May/June 2018 when the 2019 prices begin to roll out.

| Providers  | GHP   | Retirement   |
|--|---|--|
| <b>Earl Bacon Agency</b><br><i>(Robert Nylan)</i>                    | Unable to provide quote due to enrollment date deadline.  | Unable to provide DBP quote. Recommended to remain with NTCA |
| <b>Strategic Benefits Group</b><br><i>(Paul Fenstermaker)</i>        | Met on 1.19.18 & waiting for additional information       | No reply   |
| <b>Florida Blue</b><br><i>(Tallahassee Office)</i>                   | Made several attempts, unable to connect with live person | N/A  |
| <b>Capital Health Plan</b><br><i>(Tallahassee)</i>                   | FTRI not qualified due to one employee residing in Naples | N/A  |
| <b>Butler-Vause Insurance</b><br><i>(David Butler)</i>               | Referred to Financials Partners of North FL               | No reply   |
| <b>Financials Partners of North Florida</b><br><i>(Mel Pope)</i>     | Unable to quote until May 2019 (Florida Blue)             | No reply   |
| <b>The Finebloom Group</b><br><i>(Gary Carter)</i>                   | No reply  | No reply   |
| <b>First Franklin Financial</b><br><i>(Chelsea Gold)</i>             | No reply  | No interest in working with DBP                              |
| <b>Waddell &amp; Reed</b><br><i>(Rick Theobald)</i>                  | Referred to Prudential                                    | Unable to work with DBP                                      |
| <b>Prudential</b><br><i>(Trey Lafitte)</i>                           | Met on 1.14.18 & waiting for additional information       | Waiting for information (cancelled meeting due to flu)       |
| <b>Regions Bank</b><br><i>(Travis Yelverton)</i>                     | No reply  | Submitted proposal   |
| <b>FTRI's Current Plan</b><br><b>NTCA</b><br><i>(Jeff Yarbrough)</i> | United Healthcare   | NTCA   |