YOUR  
LOGO

**COMPANY NAME**

BENEFITS CONSULTING

PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to support your employee benefits strategy. We provide benefits consulting services designed to help organizations attract and retain top talent while managing costs and compliance.  
  
This proposal outlines how we will assist [Client Name] in evaluating, designing, and administering competitive and sustainable benefits programs.

# Problem or Opportunity

[Client Name] is reviewing or updating their benefits offerings to improve employee satisfaction, ensure regulatory compliance, and align with company goals. Without expert guidance, benefits programs may fall short or result in unnecessary costs.

# Proposed Solution

We propose a full-service benefits consulting engagement that includes plan evaluation, market benchmarking, carrier negotiations, and employee communication.  
  
Key Benefits:  
- Competitive and cost-effective benefit packages  
- Improved employee understanding and utilization  
- Reduced compliance risk

# Scope of Work

Our benefits consulting services include:  
  
- Current benefits review and benchmarking  
- Plan design and contribution strategy  
- Carrier/vendor selection and negotiation  
- Compliance review (ACA, ERISA, COBRA, etc.)  
- Benefits education and communication materials

# Timeline

Estimated schedule for review, strategy development, and implementation:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Assessment & Benchmarking | Review current plans and market options | [Start Date] |
| Strategy Development | Design new offerings and cost model | [Date] |
| Carrier Selection | Negotiate and finalize plans | [Date] |
| Employee Rollout | Communication and enrollment support | [Completion Date] |

# Pricing

Estimated pricing for benefits consulting engagement:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Benefits Review | Plan audit and benchmarking | [Amount] |
| Design & Strategy | Plan structure and contribution modeling | [Amount] |
| Vendor Management | Carrier search and negotiation | [Amount] |
| Employee Communications | Materials and support | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is an HR and benefits advisory firm supporting small to mid-sized businesses in building employee-focused programs.  
  
- Experience: [X] years of benefits consulting  
- Partners: [List carriers/networks if applicable]  
- Mission: To simplify employee benefits and maximize their value for employers and teams alike

# Case Studies / Testimonials

Case Study: [Previous Client Name]  
  
- Project: Benefits redesign for growing professional services firm  
- Outcome: Increased employee satisfaction by 28%, reduced premiums by 12%  
  
Testimonial:  
“[Your Company Name] helped us rethink our benefits and saved us time and money while keeping employees happy.” — [Client Name], [Title], [Company]

# Terms and Conditions

Payment Terms: Retainer-based or project fee depending on scope.  
Contract Duration: 6-month or 12-month engagement options.  
Confidentiality: All employee and plan data is handled securely and confidentially.

# Acceptance

To proceed with the benefits consulting engagement, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_