



An  NFP Company

Broker-to-Broker Resource Guide

Learn who we are, what we do, and how we can help.





WHO WE ARE

The Bailey Group is based in St. Augustine, Florida and was founded in 1996 by Mark Bailey, Sr. We have grown to become one of the largest pure benefits firms in Northeast Florida, currently handling Employee Benefits for over 300 clients ranging from five employees to 8,000. We have approximately 80 associates that make up our Group Benefits, Individual Health, and Financial Services departments.

In 2016, we became an NFP-owned firm to offer our clients the service level of a boutique agency with the infrastructure of a national organization.

WHAT WE DO

We support employers in strategic benefits analysis, decision making, benefits negotiations, wellness, and employee communication and education. We don't view ourselves as a traditional broker, but instead a partner with our clients to provide the best benefits for their employees at the best value to the employer.

HOW WE DO IT

Often times, NFP-affiliated firms come to us to "stand-in" as the Agent on Record for Florida-situs groups or to refer a client to our office. We can obtain group medical and ancillary quotes for out-of-state NFP firms, act as the back-office service support for a local group, and everything in-between.

WORKING WITH US

The Bailey Group can provide proposals and/or act as Agent of Record on any group referral client with at least 50 employees eligible for benefits.

With access to enrollment systems, group demographics, network expertise, and direct and exclusive carrier relationships, The Bailey Group can ensure an accurate process of getting your business quoted, processed, and managed.

Our process

- You'll submit your quote request on this page and work with your client determine their needs and preferences.
- You'll submit an Agent of Record letter from your client assigning The Bailey Group as their broker.
- You'll then work directly with an assigned account executive at The Bailey Group to manage all aspects of your group's enrollment process, and to serve and support your client throughout the plan year.

COMPENSATION ARRANGEMENTS

For a referral or lead

Outside NFP firm passes along a lead to The Bailey Group. The Bailey Group takes the lead and runs with it, potentially becoming AOR and handles all aspects of the account once sold.

First Year Commission Only: 25% to outside NFP firm, 75% to The Bailey Group.

Collaboration

The Bailey Group is appointed AOR but outside NFP firm maintains lead role in client relationship and The Bailey Group handles administrative, local service with carrier and does not have direct contact with the client/employer.

First Year Commission: 40% to outside NFP firm, 60% to The Bailey Group.

Subsequent Year Commission: 40% to outside NFP firm, 60% to The Bailey Group.

CARRIERS WE WORK WITH

We primarily work with the following carriers based on the following segments, but are appointed with over 200 carriers in Florida and across the US.

- Large Group (51+ eligible employees)
- Self-funded Group (200+ with self-funded medical)

Medical Carriers (Group size determined by FTE calculation)



Ancillary Carriers We Work With



NEW BUSINESS PROCESS

You'll work with a Benefits Advisor (Sales) at The Bailey Group to help obtain quotes, meet with group, etc.

Visit mbaileysgroup.com/broker-quote to start the quoting process.

What we need to start the quoting process:

- **Census (including all employees, not just eligible)**
 - Part-time/Full-time Status
 - Date of Birth
 - Residential Zip Code
 - Enrollment Tier (if available)
- **Current Plan Designs and Rates (and Employer Contributions if possible)**
- **Renewal (if available and applicable)**
- **Broker of Record Letters**
- **Producer Compensation Agreement**
- **Assignment of Account Executive (Service) at The Bailey Group**

HOW TO REACH US

General Information

info@mbaileysgroup.com

Referrals / Quotes / Leads

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Licensing

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