



Service Agreement

R&R Insurance Services, Inc. for Wauwatosa School District

Whereas R&R Insurance Services, Inc. (referred to as “R&R”) operates insurance agencies and related businesses which procure numerous lines and types of insurance products and provide related brokerage services to its customers; and,

Whereas, Wauwatosa School District (referred to as the; “Client”) wants to engage R&R to provide specified benefit services in exchange for the fees outlined in this Agreement,

Now, therefore, the parties hereto agree as follows:

1. The term of this agreement will commence on MAY 1, 2024 and shall remain in effect until APRIL 30, 2026 unless terminated earlier as provided herein.
2. This agreement is open to review at any time by either party. Either party can terminate this agreement with ninety (90) days advance written notice which will provide the specific date of termination. Fees will be paid through the date of termination.
3. R&R will receive a monthly fee to be billed in monthly installments, effective MAY 1, 2024 according to the following stated fees.

PERIOD	TOTAL	MONTHLY
MAY 1, 2024 – APRIL 30, 2025	\$117,480.00	\$9,790.00
MAY 1, 2025 – APRIL 30, 2026	\$117,480.00	\$9,790.00

4. The fixed fee is in lieu of standard agent commissions normally paid to R&R by any carriers involved for all employer-sponsored lines of coverage.
5. R&R will receive standard agent commissions for any voluntary lines of coverage.
6. A significant change (+/- 15%) in the number of eligible employees may require a modification of the fees. This will be based off of a confirmed eligible count in effect as of the commencement date of this agreement.
7. This agreement and fees cover all the listed services in the attached Scope of Services. Fees for additional services requested or required by the Client will be separately negotiated.

Wauwatosa School District

(Print Name) (Title)

(Signature) (Date)

R&R Insurance Services, Inc.

David Lancaster EVP, Benefits Practice
(Print Name) (Title)

(Signature) (Date)



Scope of Services

For

Wauwatosa School District

It is the intention of R&R Insurance Services, Inc. to provide the specific services as outlined below for the Employer Sponsored employee benefits programs. This arrangement is assured over the policy term, and is sustained by the compensation arrangement previously disclosed in this Agreement. The Services in this agreement include, but are not limited to:

Strategic Planning / Marketing

- Develop near-term and long-term benefit and health management strategies with Client leadership
- Market evaluation (all lines as needed and mutually agreed upon)
- Bidding/negotiating for employee benefit coverages and related vendor services
- Comparative proposal (all lines)
- Recommendations
- Contribution modeling

Health Management/Wellness

- Wellness plan design
- Coordination of biometrics screening and/or other wellness program vendors
- Review of aggregate biometrics screening report/benchmarking
- Onsite visits to go over the results of biometric screening and recommend wellness strategies

Compliance/HR Support

- Legislative support
 - Identify and advise on basic federal notice and disclosure requirements that apply to group health plans and/or employees under various employee benefits and employment laws
 - Monthly newsletters and breaking news alerts
- Annual Compliance Review
- Analysis/Response assistance with IRS Letter 226-J proposed ACA employer penalties (ESRP)
- Human Resource support tools
 - Access to *R&R/Zywave Benefits Client Portal*, webinars, and updates
 - Access to *InsurLink*, HIPAA-compliant web portal interface for R&R/Client data-exchange
- Access to Assurex Global Partners' programs (including free monthly compliance webinars)

Reporting

- Monthly claims analysis reporting
- Plan design analysis and benchmarking
- High cost claimant monitoring
- Cost projections and modeling

Account Management /Service

- Assist in bringing resolutions to questions and issues that are identified by Human Resources Team
- Conduct open enrollment meetings and prepare employee communications
- Assist employees with benefits questions and claims concerns
- Day-to-day support
- Medicare Consulting Services

NOTE: The stated fees do **not** contemplate the following: COBRA administrative services; Flex/Section 125 administrative services; ERISA Plan Document Administration services; Form 5500 filing preparation services; electronic enrollment platform/services such as *Employee Navigator*; enrollment decision support platform/services such as *ALEX*; FMLA administrative services such as *Leave Solutions*; or any special audit or actuarial services that may be required.