



MARTIN O'MALLEY
Governor

ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
Project Title: GROUP TERM LIFE AND ACCIDENTAL DEATH AND
DISMEMBERMENT (AD&D) INSURANCES
Project No.: F10B3400001
JULY 12, 2012

Ladies and Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference at the Department of Budget and Management's facilities located in Baltimore, Maryland, on July 9, 2012. An attendance list with the names of those who attended is included.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer, Michael Howard, convened the conference, recognized the Department of Budget and Management (DBM) personnel present, and requested that all vendors sign in. The Procurement Officer informed the vendors that a written summary of the Pre-Proposal Conference would be provided and reminded vendors that any substantive question(s) should be submitted to the Procurement Officer in writing, or e-mail if preferred. The Procurement Officer then reviewed the following sections of the RFP: Section 1 (General Information); Section 2 (Minimum Qualifications); Section 4 (Proposal Format); and Section 5 (Evaluation Criteria and Selection Procedure).

The Contract Manager for the Employee Benefits Division of the Department of Budget and Management, William Tress, summarized Section 3 (Scope of Work) of the RFP.

The MBE Liaison for the Department of Budget and Management Office of Procurement Policy and Administration, Thomas McLamore, summarized the MBE instructions and forms.

The floor was then opened to questions. The single question asked dealt with the completion of MBE forms. Following the question and answer period, the meeting was adjourned.

Date Issued: July 12, 2012

By <signed>.
Michael Howard
Procurement Officer

~Effective Resource Management~

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Atch
Attendee List

Attendee List

MBE	Name/Company	E-mail	Phone(s)	Physical Address
No	Jennifer Truby MetLife	jtruby@metlife.com	V: 410-290-5630 C: F: 410-290-6567	8825 Stanford Blvd., Suite 105 Columbia, MD 21045
No	Dee Jackson MetLife	ddjackson@metlife.com	V: 410-290-5219 C: F: 410-290-6567	8825 Stanford Blvd., Suite 105 Columbia, MD 21045
Yes	Arthur Holland NJ&C Insurance Services	aholland@njcsservices.com	V: 410-740-0971 C: F: 410-740-0972	5479 Wooded Way Columbia, MD 21044
No	Mike Collins Metlife	Mcollins3@metlife.com	V: 703-247-7244 C: F: 703-893-7851	8300 Boone Blvd., #100 Vienna, VA 22182
No	Chris Tortarello The Standard	ctortore@standard.com	V: 301-809-8705 C: F:	4321 Collington Road. Suite 270 Bowie, MD 20716
Yes	Phillip Harris Financial Integrity Resources Management	phil@firmadvisor.com	V: 800-997-7622 C: F: 410-814-7539	300 E. Lombard St., Suite 840 Baltimore, MD 21202
No	Sam Shata Shata Insurance Gr.	samshata@yahoo.com	V: 443-996-8296 C: F: 301-490-0054	9803 Rainlegh Cr Columbia 21046
Yes	Eugene Jeeter National Insurance Consultants	ej@niciinsure.com	V: 571-229-8367 C: F:	7820 Sudley Rd., Suite 100LL Manassas, VA 20109
No	Nancy LaRoche Aetna	Larouchen@aetna.com	V:410-487-2769 C: F: 860-262-7355	509 Progress Dr. #118 Linthicum, MD 21090
No	Edward Eller Minnesota Life	edward.eller@securian.com	V: 651-665-7903 C: F: 651-665-7898	400 N. Robert Street St. St. Paul, Minnesota 55101
Yes	Claude Gregory Financial & Realty Services	clauderegory@frslc.com	V: 301-755-0081 C: F: 301-650-0026	1110 Bonifant St., #301 Silver Spring, MD 20910