



**HEALTH AND WELFARE APPOINTMENT SETTING PROGRAM**

<b>Company:</b>	Wheeling Metal Manufacturing	<b>Website:</b>	<a href="http://www.wheelingmetal.com">www.wheelingmetal.com</a>
<b>Prospect Name:</b>	David Hall	<b>Email:</b>	<a href="mailto:dhall@wheelingmetal.com">dhall@wheelingmetal.com</a>
<b>Title:</b>	President	<b>Telephone:</b>	304-555-1212
<b>Address</b>	123 Any Street	<b>Alt-Phone #:</b>	304-555-9999 (cell)
<b>Address2:</b>	Suite 525	<b>Appt. Number:</b>	123-1234
<b>City</b>	Wheeling	<b>Client Name:</b>	Frank Newage
<b>State</b>	WV	<b>Produced By:</b>	Amanda Karl
<b>Zip</b>	26003	<b>Produced Date:</b>	March 14th
<b>County</b>	Ohio	<b>Appt. Date:</b>	March 28th
<b>Meeting Location</b>	Same as above	<b>Appt. Time:</b>	10:00 AM

**Information Provided By List Source**

<b>Type of Business:</b>	Manufacturing	<b>Sales Volume:</b>	\$15,700,000
<b>Year Established:</b>	1995	<b>Number of Employees:</b>	130

**Information Gathered by The PT Services Group**

Eligible employees:	120
Participating employees:	100
Reason for low participation:	N/A
Their current broker:	Jones Insurance
Anything preventing them from changing brokers:	No
Their Health Plan is currently through:	Blue Cross
They have been with them for:	4 years
Their renewal date:	July 1st
Their employees pay a portion:	Yes
Percentage:	30%
Benefit plans they currently offer:	Vision, Dental
Their role in the decision making process: Can the owner be present:	See Additional Comments
	No

**Additional Comments:**

You will be meeting with David Hall. David makes the final decision but relies on the recommendation of Mary O'Brien, Vice President of Human Resources. He will have Mary attend the meeting. He and Mary have been frustrated over the lack of a plan to control benefit costs. He said they just wait for the renewal and hope it's not too high. David believes there must be a better way to approach their benefits.