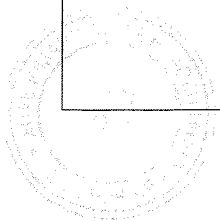


**Expression of Interest (EOI)**  
**FOR**  
**Appointment of**  
**General Insurance Adviser / Consultant**

**REF NO: CRGB / GB/ Notice/06/2021-22**

**DATED: 20/10/2021**



## **Expression of Interest (EOI) for Appointment of General Insurance Advisor / Consultant**

Applications are invited by Chhattisgarh Rajya Gramin Bank (CRGB) from IRDA licensed Insurance Firms/Companies operating in India for engagement of pre and post Insurance Services. Only those firms who fulfil the Pre-qualification criteria are eligible to participate in this tender.

The "Expression of Interest" (EOI) for the project is available on Bank's website [www.cgbank.in](http://www.cgbank.in) under Tender Section. Interested bidders are requested to refer to the said EOI Notice. Bids made strictly as per provisions of the EOI Notice document should be submitted.

1	Date of commencement of bidding process	20/10/2021, 11.00 am
2	Pre-bid meeting	29/10/2021, 1.00 pm
3	Last date for bid submission	06/11/2021, 3.00 pm
4	Tentative Date and Time for opening of: Technical Bid - Eligibility details Technical Bid- Detailed Bid	08/11/2021, 1.00 pm
5	Tentative Presentation date for eligible bidders	12/11/2021, 11.00 am

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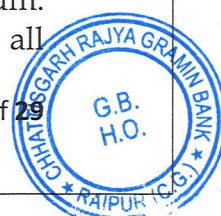
1.	Section 1	Introduction & Instructions
2.	Section 2	Eligibility of Firms
3.	Section 3	Scope of Work
4.	Section 4	Assessment Criteria
5.	Section 5	Annexure & Declaration



## Section -I

### Introduction & Instructions of Bank

- Chhattisgarh Rajya Gramin Bank (CRGB) , a Regional Rural Bank established under Regional Rural Bank Act 1975.
- Only well established and reputed Insurance Firms which are Registered / Issued License by Insurance Regulatory and Development Authority (IRDA) are eligible for the engagement.
- The Insurance Firm should have experience in handling end to end Insurance programme of large corporate. Insurance Firms with experience in handling Health Insurance, Bank's own Assets/Property Insurance, Bankers Indemnity Insurance, Staff PAI, Lockers Insurance, Insurance for cyber frauds and any other policies for Regional Rural Bank/Banks in India would be given preference in empanelment.
- All entries in the tender should be submitted in the Technical formats as per enclosed annexure without any ambiguity.
- Technical bid will be opened on specified date and time as given in the EOI Notice. Top 3-4 bidders on the basis of score in technical bid will be invited for presentation.
- All Notices and correspondence to the bidder(s) shall be sent by email only, till finalization of tender takes place. Hence, the bidders are required to ensure that email address provided by them is valid.
- At any time prior to the deadline for submission of tender, the Bank may for any reason, modify the EOI Notice. As such bidders are requested to see Bank's website ([www.cgbank.in](http://www.cgbank.in)) once again before the last date of submission of bid to ensure that they have not missed any corrigendum uploaded against the said EOI Notice. The responsibility of downloading the related corrigendum, if any, will be of the bidder only. No separate intimation in respect of corrigendum to this EOI Notice (if any) will be sent to tenderer(s) who have downloaded the documents from the website. In case any bidder has already submitted proposal before issue of corrigendum, the bidder may submit additional documents/information pertaining to that corrigendum, but only before the last date of submission of bid.
- CRGB will organize a pre-bid meeting, to resolve any queries, bidders may have. Any further information will be provided to all bidders by Bank as corrigendum. Any clarification in queries raised by any bidder will be communicated to all





bidders. The exact date, time of the pre-bid meeting is as already stated in this EOI Notice. If query not received from any of the interested bidder, Pre-Bid meeting will not be organized.

- The Bank reserves the right to accept or reject any or all the proposals in whole or part without assigning any reasons.
- The tender shall remain open from the pre-announced date & time till as much duration as mentioned in this EOI Notice.
- Bank reserves the right to cancel or reject or accept or withdraw or extend tender in full or part as the case may be without assigning any reason thereof.
- No deviation of the terms and conditions of the tender document is acceptable. Submission of bid by any bidder confirms his acceptance of terms and conditions for the tender. No deviation to the technical terms and conditions is allowed. The selection of insurance firms resulting from this tender shall be governed by the terms and conditions mentioned therein.
- The bidders must submit all documents required as per terms of EOI Notice. Any other document submitted which is not required as per terms of EOI Notice shall not be considered.
- The bid will be evaluated on the basis of the filled-in technical formats. The documents submitted by the bidder(s) will be scrutinized. In case any of the information furnished by the bidder is found to be false during scrutiny, the bid will be rejected.
- During pre-qualification and evaluation of the tender, the Bank may, at its discretion, ask bidders for clarifications on their proposal. The bidders are required to respond within the time frame prescribed by the Bank.
- The proposal may be submitted along with the covering letter about the proposal, accompanied by the information/documents indicated in the Annexures and the declaration signed by the authorized signatory with Seal of the Company. All pages are required to be signed.
- Out of the three/four selected firms/companies; one Insurance firm will be finally appointed as General Insurance Advisor / Consultant of the Bank for servicing of the insurance policies, based on the presentation given by them. Initial details of the selected tenure for 2 years and thereafter may be renewed for a maximum of another two terms of one year each, subject to review & satisfactory performance.





## **Section 2**

### **A. Eligibility of Firms**

Insurance Firms must satisfy the following pre-qualification criteria to be eligible to apply for appointment. Respondents satisfying the following criteria only are eligible to submit their proposal -

- a. This invitation to respond to the EOI Notice is open only to reputed and well established registered companies/ firms.
- b. The Insurance Firms must be registered / issued license by Insurance Regulatory and Development Authority (IRDA).
- c. The firm/company should have been in existence in India for a period of at least Five (5) years as on March 31, 2021, and their licenses should current and valid as on date. The Insurance Firm should have services as Advisor/Consultant for at least two RRBs/PSBs/PSUs in each of the last 3 financial years i.e. 2018-19, 2019-20, 2020-21 and in the current year 2021-22 as well.

The proposal of the firm which does not meet any of the above criteria will not be evaluated further.

### **B. DISQUALIFICATIONS**

Bank may at its sole discretion and at any time during the evaluation of proposal, disqualify any bidder, if the bidder -

- a. If it is found to have made misleading or false representations in the forms, statements and documents submitted in proof of the eligibility requirements; has failed to provide related clarifications, when sought; or
- b. If bidder has been suspended / delisted / blacklisted by any Govt. Ministry / Department / Public Sector Undertaking / IRDA / SEBI / IBA / Autonomous Body / Financial Institution / Court etc. for corrupt and fraudulent practices or blacklisted any time in the past.



## **Section 3**

### **Scope of Work**

The Insurance advisor/consultant firm would be functioning as a Strategic consultant for BANK and would be assisting the Bank in pre-placement, placement and post-placement process of the Insurance programme.

#### **I. Pre-Placement Services**

The Insurance advisor/consultant firm would assist the Bank in customization, design and placement of Assets/Lockers/ Indemnity Insurance / Staff PAI /Group Medi claim Insurance Policies with specific inputs in Cost Containment measures, Claims Handling, Grievance Redressal Process, and Claims Tracking by Web based MIS, Communication Plans and Validation & Forecasting of Additional Coverage Benefits.

#### **II. Placement Services**

The Insurance advisor/consultant firm would be assisting the Bank in the placement process as under:

- a. Determine evaluation criteria for Insurer selection in association with BANK.
- b. Assess service requirements and Insurer capabilities in the market place.
- c. Assist bank to prepare RFP and invites proposal from Insurers.
- d. Advising Bank during evaluation of proposal and finalisation of insurer.
- e. Placement of policies as per agreed terms and conditions.
- f. Data consolidation for endorsement and policy issuance.

#### **III. Post- Placement Services**

The Insurance advisor/consultant firm would undertake the following actions as part of post-placement activities -

- a. Servicing Support-The Insurance advisor/consultant firm would be Single point of contact for all services and establish clear escalation matrix for query resolution. They will be required to depute full time manpower at the Administrative Office of the Bank for servicing support. The Insurance will ensure endorsement / claims settlement as per agreed terms and conditions, and arrange coordination meetings with the Insurance Company, TPA, and Surveyors whenever required.

- b. Communication Support-The Insurance advisor/consultant firm will arrange for communication assistance in case of any major change in plan design and will also arrange for Frequently Asked Question (FAQ) design.
- c. Claim Monitoring & Periodic Review -The The Insurance advisor/consultant firm will arrange for preparation and presentation of Monthly claims report / utilization report. They will also arrange for Quarterly Third Party Administrator (TPA) data audit to ensure consistency between claims filed and claims cleared by the TPA and Insurer company for non medical insurances of Bank.





## Section 4

### Assessment Criteria -

#### **A. Proposal Requirements:**

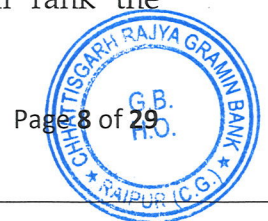
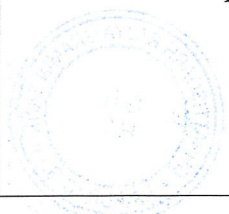
The response to the present Notice will be submitted contained reply to Technical Bid. The 'Technical Bid' will contain technical details as indicated in Annexure - I.

**Envelope: 1** Technical Bid (Super scribed as **"Technical Bid for Appointment of Advisor/Consultant for General Insurance Services"**).

1.	Covering Letter	Introduction of Bidder with Board Resolution of Authorized Signatory and ID-Address proof documents.
2.	Technical Evaluation	As per Annexure- II with all Supporting annexure and other Documents
3.	Proposal Compliance Letter	A signed letter by the authorized officer of the company / firm certifying the proposal's Complete compliance with the EOI Notice specifications (as per Annexure- III)
4.	Declaration Certificate	As per Annexure-IV

#### **B. Process to be adopted for Evaluation of the Bids -**

1. The evaluation of the bids received will be made on the basis of technical evaluation and presentation component.
2. The technical evaluation would be done in two stages. In the first stage, Technical Bids in respect of only those bidders who fulfill the eligibility criteria indicated in the Section - 2 of this EOI Notice will be considered for evaluation. The eligible technical Bids will be evaluated on the basis of Technical details and the points to be awarded as per evaluation matrix in Annexure -II.
3. In the second stage of technical evaluation, top three / four scorers will be selected for further evaluation on the basis of marks scored. The successful bidders will be invited to make a presentation to an internal committee constituted for the purpose. In case of tie, all companies at same rank will be invited to make the presentation. The internal committee will rank the



presentations. All three/four participants would be informed about their rank in the presentation.

4. A final decision will be taken on the basis of marks scored technical evaluation (Technical Scores and presentation includes)

**C. Bank Reserves the right to -**

1. Reject any or all responses received in response to the EOI Notice without assigning any reason whatsoever.
2. Cancel the EOI Notice/ Tender at any stage, without assigning any reason whatsoever.
3. Waive or Change any formalities, irregularities, or inconsistencies in this proposal (format and delivery). Such change/waiver would be duly and publicly notified by issuing corrigendum against the tender on BANK website.
4. Extend the time for submission of all proposals and such an extension would be duly notified on BANK website.
5. Select the next most responsive bidder if the first most responsive bidder evaluated for selection fails to result in an agreement within specified time frame.
6. Select the bidder for servicing the policies even if a single bid is received as response.
7. Share the information / clarifications provided in response to EOI Notice by any bidder, with all other bidder(s)/others, in the same form as clarified to the bidder raising the query.

**D. Bid Submission**

Intending Insurance firms / companies are required to submit their applications giving full particulars as per item Annexure I above to the following address:

**GENERAL MANAGER,  
CHHATTISGARH RAJYA GRAMIN BANK,  
HEAD OFFICE,  
MAHADEO GHAT ROAD, SUNDER NAGAR,  
RAIPUR (C.G.) – 492 013.**

The proposal needs to be submitted offline; Proposals received by facsimile shall be treated as invalid and shall be rejected. Only detailed complete proposal in the form indicated, received with in the closing time and date, shall be taken as valid.





The last date for submission of proposal is 06/11/2021, 3.00 pm  
Applications received thereafter should be rejected.

The bid should be signed by the bidder or any person duly authorized to bind the bidder to the contract. The signatory should give a declaration and through authenticated documentary evidence establish that he/she is empowered to sign the tender documents and bind the bidder. All pages of the tender documents except company brochures, if any, are to be signed by the authorized signatory.

The bid should contain no interlineations, erasures or over-writings except as necessary to correct errors made by the bidder. In such cases, the person/s signing the bid should authenticate all such corrections by putting his/her full signature.

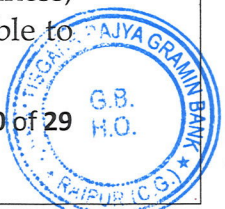
The bidder is expected to examine all instructions, forms, terms and conditions and technical specifications in the Bidding Documents. Failure to furnish any information required by the Bidding Documents or submission of a bid not substantially responsive to the Bidding Documents in every respect will be at the Bidder's risk and may result in rejection of the bid.

No columns of the tender should be left blank. Offers within sufficient information and Offers which do not strictly comply with the stipulations given above, are liable for rejection.

#### **E. EOI NOTICE Terms & Conditions**

The following additional terms and conditions shall apply to the evaluation process -

- Bidder warranties-By submitting a Response, Bidder represents and warrants to Bank that, as at the date of submission -
- The Bidder has fully disclosed to BANK in its Responses all information which could reasonably be regarded as affecting in any way BANK's evaluation of the Response;
- All information contained in the Bidder's Response is true, accurate and complete and not misleading in any way;
- No litigation, arbitration or administrative proceeding is presently taking place, pending or to the knowledge of the Bidder threatened against or otherwise involving The Bidder which could have an adverse effect on its business, assets or financial condition or upon BANK's reputation if the Response is successful;
- The Bidder will immediately notify BANK of the occurrence of any event, factor circumstance which may cause a material adverse effect on the Bidder's business, assets or financial condition, or BANK reputation or render the Bidder unable to





perform its obligations under the BANK agreement, if any or have a material adverse effect on the evaluation of the responses by BANK; and

- The Bidder has not and will not seek to influence any decisions of BANK during the evaluation process or engage in any uncompetitive / unfair behaviour or other practice which may deny legitimate business opportunities to other Bidders.

**Confidentiality**-Bidder must keep confidential any information received from or about Bank as a result of or in connection with the submission of the Response. All such information received from Bank, including those in subsequent communications, shall be deemed confidential and may be used only in connection with the preparation of Bidder's Response. Unless expressly agreed in writing prior to submissions, bidder responses are not confidential and may be used by BANK in whole or part. BANK however, will not disclose the information provided by Bidder in a Response other than to its affiliates or to its professional advisors, unless required otherwise by any provisions of law.

Additionally and at any point of the evaluation and selection process, BANK may require the Bidder to execute a 'Non-Disclosure Agreement' (NDA), if the Bidder has not executed an NDA with BANK previously.

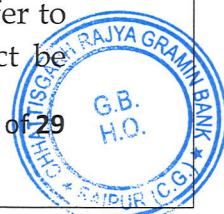
**Disclaimer** - Whilst all reasonable care has been taken in compiling this EOI Notice document, and the figures, documents and details in this document or in subsequent communications hereafter are presented in good faith; no warranty or guarantee (express or implied) is given by BANK as to the completeness or accuracy of the responses or any information provided in or in connection with it. Further, to the maximum extent permitted by law -

BANK, its officers, employees and agents will not be liable in any way whatsoever for any loss, damage, cost or expense (including without limitation any liability arising from any fault or negligence on their part) arising from the evaluation process; and

Each Bidder indemnifies Bank from all claims, suits, demands, proceedings, actions, liabilities, damages and costs which may arise under statute, law, equity or otherwise arising from, whether directly or indirectly, or in connection with the evaluation and selection process.

This EOI Notice is not an offer to contract, nor should it be construed as such; it is a definition of specific Bank requirements and an invitation to recipients to submit a responsive proposal addressing such requirements. Bank reserves the right to not make any selection and/or not enter into any agreement pursuant to this EOI Notice.

It should be understood that your response to this EOI Notice constitutes an offer to do business on the terms stated in your response and that, should a contract be



awarded to you, Bank may, at its option, incorporate all or any part of your response to this EOI Notice in the contract. Bank reserves the right to accept your offer without further discussions and without any additional opportunity for you to amend, supplement or revise your submitted offer.

Bank's right to verify - Bank reserves the right to conduct a site survey or obtain other evidence of facilities, resources, and managerial, financial and Bidder performance abilities prior to announcing the successful Bidder or awarding an agreement under this evaluation process.

Financial documents - Bank may request additional financial/business information from the Bidder at its discretion.

**Termination/or suspension of evaluation process** - BANK reserves the right to suspend or terminate the Bidder evaluation process (in whole or in part) at any time in its absolute discretion and without liability to the Bidder or any third party. Bidders will be notified if any suspension or termination occurs but BANK is not obliged to provide any reasons.

Other Rights - Without limiting its rights under any other clause of this evaluation processor at law, and without liability to the Bidder or any third party, BANK may at any stage of the evaluation process:

- Require additional information from a Bidder;
- Change the structure and timing of the evaluation process;
- Terminate further participation in the evaluation process by a Bidder;
- Negotiate with more than one Bidder;
- Terminate negotiations being conducted with a Bidder;
- Vary or extend the time table and evaluation process
- Accept any non-complying Response; or
- Vary the terms and conditions of the evaluation process or specifications or requirements at anytime.

**Responsibility for Costs** - Bidder is responsible for all costs, expenses or liabilities incurred by them or on their behalf in relation to the evaluation process (including in relation to providing BANK with the response, the revised response or any additional information).

**Non-Reliance by Bidder** - The Bidder, by submitting a Response, acknowledges that:

It does not rely on any information, representation or warranty, whether oral or in writing or arising from other conduct, other than that specified in this EOI Notice or otherwise provided by BANK in writing;

It has made its own inquiries as to regarding the risks, contingencies and other circumstances that may have an effect on the Bidder's Response as well as the accuracy, currency or completeness of such information; and

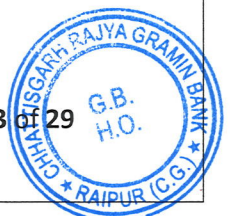
**BANK's right to vary** - BANK reserves the right to vary any aspect of this evaluation process / EOI Notice without liability to Bidder. Where BANK varies any aspect of this evaluation process or the EOI Notice, BANK shall notify that variation.

**Incorporation of Responses into agreement** - The successful Bidder as concluded by BANK shall sign a Service Level Agreement (SLA) agreement. BANK may, at its sole discretion, incorporate any portion of any successful Response of a successful Bidder in to the final SLA agreement.

**Precedence of Documents** - If there is any inconsistency between the terms of this EOI Notice and any of its annexure, schedules or attachments then, unless the contrary is explicitly stated in this EOI Notice, the terms of the EOI Notice will prevail to the extent of any inconsistency.

**Governing Laws & Dispute Resolution** - The EOI Notice and selection process shall be governed by and construed in accordance with the laws of India. Any dispute arising out of the EOI Notice process shall be referred to arbitration under the Arbitration & Conciliation Act, 1996. The arbitral tribunal shall consist of three arbitrators-one each to be appointed by BANK and Bidder and the two appointed arbitrators then appointing an umpire. The venue of arbitration shall be RAIPUR. Any appeal will be subject to the exclusive jurisdiction of courts at RAIPUR.

**Governing Language** - The proposal, all correspondences / communications and other documents pertaining to the contract shall be written in English/Hindi.





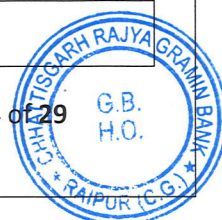
## Section - 5

### ANNEXURE - I

#### EXECUTIVE SUMMARY ON EMPANELMENT OF GENERAL INSURANCE ADVISOR/ CONSULTANT WITH BANK

REF NO:

1	Name of the Company/ Firm					
2	Complete Address with Tel No. & Website (for further communication)					
3	Name, Designation, Contact No. & Email ID of the official for any communication in relation to					
4	Names of the J V Partners & % of stake held by each as at 31.03.2021					
5	Year of Establishment					
6	Month & Year of Business Commencement					
7	IRDAI License No. and Date					
8	PAN					
9	GSTIN					
10	Financial Information (Rs. In Crore)					
		2017-18	2018-19	2019-20	Average For 3 Yrs.	2020-21
A	Invested Capital					
B	Annual Revenue					
C	Operating (Profit/Loss)					
D	Profit/ Loss after Tax					
E	Accumulated Profit/ Loss					
F	Net worth					



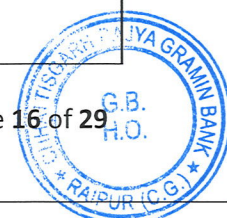
## Annexure-II

### Technical Evaluation:

SL	Criteria	Points	Total	Documents submission	Marks Scored
1	Number of years since license given by IRDA as on March 31, 2021		10	Copy of IRDAI License	
	Between 7 to 8 Years	4			
	Above 8 upto 10 years	6			
	Above 10 upto 12 years	8			
	Above 12 years	10			
2	Paid up capital (Rs. in Crore) Average for three Years 2017-18,2018-19 and 2019-20 ( Audited)		5	CA Certificate along with Audited B/S	
	Between 1 crore to 2 crore	1			
	Above 2 crore to 3 crore	2			
	Above 3 crore to 4 crore	3			
	Above 4 crore	5			
3	Annual Revenue (Rs. In Crore) Average for three Years 2018-19,2019-20 and 2020-21 (Audited)		5	CA Certificate	
	Between 5 crore to 10 crore	2			
	Above 10 crore to 20 crore	3			
	Above 20 crore to 30 crore	4			
	Above 30 crore	5			

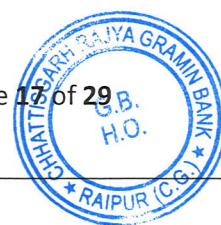


4.	Experienced people, having worked in Nationalized Insurance PSU companies (at the level of Divisional Manager and above) on Regular rolls of Bidder as on date ending last day of the month previous to the Bid submission date:		5	Declaration Certified by Authorised Signatory	
	4- 7 Experienced Employees	3			
	More than 7 Experienced Employees	5			
5.	Number of Employees ( In India) as on 31.03.2021		5	Declaration Certified by Authorised Signatory	
	Between 100 to 150	3			
	More than 150	5			
6	Overall Premium placed for (Rs. in crore) Average for three Years 2018-19,2019-20 and 2020-21		10	CA certificate	
	Upto 200 crore	4			
	More than 200 upto 400 Crore	6			
	More than 400 upto 500 Crore	8			
	More than 500	10			
7	Currently listed as Insurance with Banks as on date.		10	Declaration Certified by Authorised Signatory	

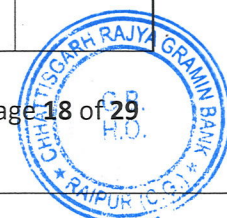




	15 – 20 Banks	5			
	More than 20 Banks	10			
8	Years of experience in managing RRBs without any Gap as on date		10	Declaration Certified by Authorised Signatory	
	Upto 3 Years	3			
	More than 3 to 5 Years	5			
	More than 5 Years	10			
9	Number of Corporate Non Health Insurance Policies placed by (average in last 3 F.Y. ending 31.3.2021) for RRBs.		5	Declaration Certified by Authorised Signatory along with relevant extract of the policies	
	10- 15 Policies	3			
	More than 15 Policies	5			
10	Number of Corporate Group Mediciam Policies (including Banks) having coverage of minimum 5,000 people (existing as on date)		5	Declaration as per format given in Annexure V along with relevant extract of the policies / endorsement showing number of lives	



	3 Policies	3			
	4 Policies and above	5			
11	Experience of Settlement Non Health Insurance Policies claims (average in last 3 Years ending 31.3.2021) for Banks only		10	Self-Declaration duly signed by authorized signatory	
	5-10 Crores	5			
	10-20 Crores	7			
	More than 20 Crores	10			
12	Total number of claims managed under Health Policies handled by you (Average for three Years 2018-19,2019-20 and 2020-21 )		5	Self-Declaration duly signed by authorized signatoryas per Annexure VI	
	Upto 50,000	1			
	More than 50,000 up to 1,00,000	2			
	More than 1,00,000 up to 1,50,000	3			
	More than 1,50,000	5			
13	Amount of claims managed under Health Insurance Policies (Rs. in Crores) Average for three Years 2018-19,2019-20 and 2020-21)		5	Self-Declaration duly signed by authorized signatoryas per Annexure VI	
	Upto 50 Crores	2			
	More than 50 up to 100 Crores	3			



	More than 100 up to 150 Crores	4			
	More than 150 Crores	5			
14	Total number of claims settled under Health Insurance Policies (Average for three Years 2018-19,2019-20 and 2020-21 )		5	Self-Declaration duly signed by authorized signatoryas per Annexure VI	
	Upto 50,000	2			
	More than 50,000 up to 1,00,000	3			
	More than 1,00,000 up to 1,50,000	4			
	More than 1,50,000	5			
15	Amount of claims settled under Health Insurance Policies (Rs. in Crores) (Average for three Years 2018-19,2019-20 and 2020-21 )		5	Self-Declaration duly signed by authorized signatoryas per Annexure VI	
	Upto 50 Crores	2			
	More than 50 up to 100 Crores	3			
	More than 100 up to 150 Crores	4			
	More than 150 Crores	5			
	TOTAL MARKS SCORED (Out of 100 )				
TOTAL MARKS SCORED -100					





Presentation:(Marks -20)

Top Three (3) eligible bids in terms of Technical Bids will be invited to make a presentation to an internal committee constituted for the purpose. In case of tie, all companies at Third rank will be invited to make the presentation. The Internal Committee will rank the presentations. All three (3) Participants would be informed about their rank in the presentation

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



Annexure-III  
COMPLIANCE LETTER

We here by undertake and agree to abide by all the terms and conditions stipulated by BANK in the EOI Notice document.

We certify that the services proposed to be offered by us in response to the bid confirm to the technical specifications stipulated in the bid.

We certify that all the information furnished by us and all the supported documents attached are true and confirm to the technical specifications stipulated in the bid.

(Signature)

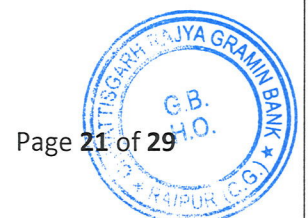
Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



Annexure-IV

DECLARATION CERTIFICATE

I / We do here by declare that there is no case pending with the Police/ Court/ IRDA/SEBI/Regulatory authorities against the proprietor/firm/partner/ employee.

Also I / We have not been suspended / delisted / blacklisted by any other Govt. Ministry /Department / Public Sector Undertaking / IRDA / SEBI / Autonomous Body / Financial Institution/PSBs/RRBs/ Court for corrupt and fraudulent practices in the past.

We certify that neither our company / firm nor any of the directors / partners are involved in any scam or disciplinary proceedings settled or pending adjudication.

We hereby undertake and confirm that we have understood the scope of work properly and shall carry out the work as mentioned in this EOI Notice.

(Signature)

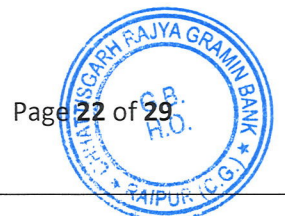
Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -





### ANNEXURE-V (A)

Track Record of Assets/Indemnity Insurance Policies managed for corporate including Banks (Period from 01.04.2018 to 31.03.2021) with Minimum 50 crore				
Sl. No.	Name and Complete postal address of the Regional Rural Bank/ Public Sector Banks	Name, Telephone, email address of the contact person	No. of years of Firm ship	Lives covered Under GMC policy
1				
2				
3				
4				

(Enclose necessary document proof)

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



**ANNEXURE-V (B)**

Track Record of Health Insurance Policies managed for corporate including Banks (Period from 01.04.2018 to 31.03.2021) with Minimum 2000 lives				
Sl. No.	Name and Complete postal address of the Regional Rural Bank/ Public Sector Banks	Name, Telephone, email address of the contact person	No. of years of Firm ship	Lives covered Under GMC policy
1				
2				
3				
4				

(Enclose necessary document proof)

(Signature)

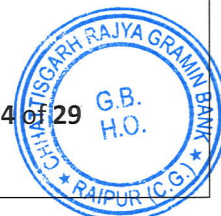
Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



### ANNEXURE-V (C)

Track Record of Staff PAI Insurance Policies managed for corporate including Banks (Period from 01.04.2018 to 31.03.2021) with Minimum 2000 lives				
Sl. No.	Name and Complete postal address of the Regional Rural Bank/ Public Sector Banks	Name, Telephone, email address of the contact person	No. of years of Firm ship	Lives covered Under GMC policy
1				
2				
3				
4				

(Enclose necessary document proof)

(Signature)

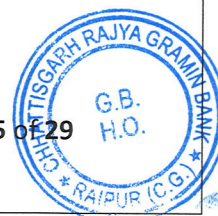
Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -





### ANNEXURE-VI (A)

Information on Claims Management, and Experience & Data regarding claims settled in corporate policies managed by the Company under Assets/Indemnity Insurance Policies.

(Amount in Crore)

Year	No. Of Claims Lodged	Total Claimed Amount	No. Of Claims Settled	Total Claim settled amount	% of claim settlement
2017-18					
2018-19					
2019-20					
Average for three years					
2020-21					

(Enclose necessary document proof)

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



### ANNEXURE-VI (B)

Information on Claims Management, and Experience & Data regarding claims settled in corporate policies managed by the Company under Health Insurance Policies.

(Amount in Crore)

Year	No. Of Claims Lodged	Total Claimed Amount	No. Of Claims Settled	Total Claim settled amount	% of claim settlement
2017-18					
2018-19					
2019-20					
Average for three years					
2020-21					

(Enclose necessary document proof)

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -



### ANNEXURE-VI (C)

Information on Claims Management, and Experience & Data regarding claims settled in corporate policies managed by the Company under Staff Personnel Accident Insurance Policies.

(Amount in Crore)

Year	No. Of Claims Lodged	Total Claimed Amount	No. Of Claims Settled	Total Claim settled amount	% of claim settlement
2017-18					
2018-19					
2019-20					
Average for three years					
2020-21					

(Enclose necessary document proof)

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -





## ANNEXURE-VII

### PRICE BID

We have understood the prequalification criteria, scope of the services to be offered, the terms and conditions for the appointment to be rendered by the General Insurance Advisor / Consultant specified by Chhattisgarh Rajya Gramin Bank in their EOI as well from their standard agreement for the captioned purpose and we will abide by the same in case our proposal is accepted.

Accordingly, we now quote a total lump sum professional fees at \_\_\_\_\_ % (in figure) \_\_\_\_\_ (in words) of the estimated cost (Premiums of the policy) plus GST at actual as applicable. We also agree that the above payment of the fees will be released on pre-determined stages and progress of work based on the standard terms of Chhattisgarh Rajya Gramin Bank in this regard.

(Signature)

Name \_\_\_\_\_

Designation \_\_\_\_\_

Stamp and seal

Place -

Date -

