



Want faster, more accurate quotes?

Use this checklist to quickly get the effective quotes you need

The road to quicker business decisions starts with the request for a quote. When you ensure quote requests are submitted accurately, you're helping your clients make faster business decisions, get the benefits they need more quickly, and preventing extra work for yourself down the road.

The Basics

Requested Effective Date

Requested Benefits — include the books and/or benefit summaries

Requested Commissions — standard or flat

Coverage Status — transferred or new line of coverage

Rates — include both current and renewal

Census Data — please include for Life and Disability insurance

Contribution Status — indicate non-contributory, contributory, or voluntary

Implementation Info

Enrollment Firm

Ben Admin

Other

Experience (as required based on case size and coverage)

Short Term Disability — 200+ lives with 2 years of experience

Life, Long Term Disability & Optional Life — 500+ lives with 5 years of experience



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