

Dear valued employer,

In an effort to make the quoting process as easy as possible for your company of 51+ eligible employees, I am providing you with a checklist of all the items I will need in order to provide you with the most accurate and competitively priced quotes from a variety of insurance carriers.

About Your Company

- Company name, city and zip code
- Headquarters location, if different
- Brief description of what your company does

About Your Current Plan(s)

- When will your new plan go into effect?
- Employer contribution toward employee/dependent costs
- Current carrier and carrier history for the last five years
- Requested benefits (or indicate to match current benefits)
- If life is requested, include salary type (flat, job-classed or salary-based; if salary-based, include salaries)
- Current benefit outlines or plan descriptions
- Current rates for each plan and renewal rates/renewal percentage

Additional Underwriting Information

- Are there any known large claims, over \$25,000, or serious ongoing medical conditions (employee or dependent)?
Provide diagnosis & prognosis for each.
- Are there any known pregnancies? Provide due date(s).
- Are there any known disabilities (employee or dependent)?
Provide diagnosis & prognosis for each.

Census Data

- Gender, age/date of birth, and insured dependent status (i.e., employee, employee + child)
- Indicate COBRA participants (provide COBRA start or end date)
- Indicate coverage (HMO, PPO, POS or Kaiser) for each employee
- Indicate those waiving, declining, and those in probationary period (if in a probationary period, indicate date of availability)
- Home zip codes for each employee

Reminders

Please note that carrier response time can vary from 2 to 14 business days. Additionally, you must cancel your current carrier upon approval of the new carrier.

If you need clarification on any of the items requested above, I would be happy to assist you.