

# **Group Coverage Information Checklist**

For groups with 300 or more eligible employees

To receive the best possible quote, please compile the following information:

## **I. Census Data (Preferably electronic)**

By Eligible Employee:

- Date of birth
- Gender
- Amount of coverage
- Income (if basis for coverage)
- Occupation (if basis for coverage, or LTD is being requested)

## **II. Experience**

Required for quotes on:

1. Life Insurance (over 500 employees)
2. Short Term Disability Insurance (over 200 employees)
3. Long Term Disability Insurance (over 300 employees)

Experience consists of the following information by year and coverage for as many as 5 years:

- Premium paid
- Claims paid (Life waiver of premium claims LTD open and closed claims)
- Rate changes
- Plan changes
- Current premium report

## **III. Coverage Descriptions**

- Provide a copy of your current policy, certificate or summary plan description.
- Detail any pending coverage changes.
- Indicate any union bargained benefits.

### **Questions? Contact Us:**

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