



LIFE AND DISABILITY QUOTE CHECKLIST

All groups

- Effective date
- Proposal due date
- Number of eligible employees
- In force plan design, benefit summaries, and/or certificates (if applicable)
- Total commission amount (broker and agency combined total)
- Broker/brokerage and/or agency name
- Situs state/headquarters
- In force and renewal rates (if applicable)
- Census that contains:
 - Gender
 - Date of birth
 - Salary
 - Pay frequency
 - Occupation
 - ZIP code
 - Class designation (if applicable)
 - Voluntary Group Term Life benefit amount
 - Voluntary Short Term Disability and Voluntary Long Term Disability coverage indicator

200+ groups

Short Term Disability and Voluntary Short Term Disability

- 200+ lives enrolled
- 2-3 years paid claims
- Premium

Long Term Disability

- 300+ lives enrolled
- 3-5 years paid claims
- Open and closed claims
- Premium

Voluntary Long Term Disability

- 200+ lives enrolled
- 3-5 years paid claims
- Open and closed claims
- Premium

Group Term Life and Voluntary Group Term Life

- 500+ lives enrolled
- 3-5 years paid claims
- Waiver claims
- Premium

Sold groups

- Prior carrier's bill (for grandfathering current life coverage amounts)
- List of all employees not actively working that contains:
 - Name
 - Date of birth
 - Gender
 - Salary
 - Insurance coverages
 - Date of leave
 - Reason for leave
 - Estimated date of return

Ready to quote?

Email the information required to gubusinesssubmissionspnw@usablelife.com.