



Headquarters: 6200 S. Gilmore Road, Fairfield, OH 45014-5141
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cinfin.com 513-870-2000

Worksite Case Qualifier

Agent type selection: New, Re-Enrollment - All Employees, Re-Enrollment - New Hires Only

Agent name, Email, Agency name, Agency code, Name of employer, Type of industry, Total number of eligible employees, Primary contact at employer, Phone, Primary location of employer (Street, City, State, ZIP Code)

Are there multiple state locations? If yes, indicate what states
Are all state licensing and appointment requirements fulfilled for agency and writing agents?

Applications will not be accepted for states where licensing and appointment requirements have not been met. Please contact licensing at 513-870-2257.

Agency relationship to employer:

Agency relationship options: Commercial account with CIC, Group benefits account, Commercial account written with other, Personal Lines referral, Other:

Will products be offered in addition to Cincinnati Life products?
If yes, what types of coverage are being offered?
Will group meetings be scheduled?
Will mandatory one-on-one meetings be scheduled?
Will the employer provide a contact person to support you during the enrollment?
Do you have a target date for enrollment? If yes, when?
Are you going to use any additional staff/enrollers during enrollment?
If yes, who? All enrollers must be life licensed.

Please check all pay frequencies that apply:

Pay frequency options: Weekly (52 per year), Bi-weekly (26 per year), Semi-monthly (24 per year), Monthly (12 per year), Monthly bank draft

Additional comments:

Fax or email completed form to your life sales field or worksite marketing representative.