

# Strategy Meeting

# Next Steps

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- ☐ Choose Carriers
- ☐ Choose Plans
- ☐ Employer Contribution
- ☐ Full Time Eligibility
  - ☐ How many hours per week?
- ☐ New Hire Waiting Period?
  - ☐ 30 days or 60 days

## Items Needed

- ☐ Quarterly Wage and Tax Statement
- ☐ Employee Census
- ☐ Do you offer Worker's Comp
  - ☐ If yes, who is the carrier?
- ☐ How many years in business?
- ☐ Company Structure?
  - ☐ LLC, C Corp, S Corp, etc