



# INFINITUS

## What is needed to get a Quote?

- Email RFP to : [ron@theinfinitus.com](mailto:ron@theinfinitus.com)

## Here's what's needed:

- Group name/address/nature of business or SIC
- Proposed effective date
- Agent compensation requirements
- Employer contribution status by line of coverage
- Current plan design (booklet/certificate/policy preferred)
- Current/renewal/competitor rates
- If voluntary, copy of current bill or roster with participation by line
- Census requirements:
  - Life: DOB/Gender
  - STD: DOB/Gender/Salary
  - LTD: DOB/Gender/Salary/Occupation
  - Dental: DOB/Gender/Number of eligible employees
  - Vision: DOB/Gender/Number of eligible employees
  - Medical: DOB/Gender/Address/Hire Date/Coverage type: \*\*EE/ES/EC/Family/ Any on Cobra
  - \*ACC/HI/CI/C: DOB/Gender

## Experience Requirements for traditional quotes

Life	250+ participants:	Premium & Claims/Approved PW claims/rates/booklet
STD	100+ participants:	Premium & claims/rate/booklet Number of open and closed claims for last 3 years
LTD	300-500 participants:	Open & Closed claims for 3 years/w DOB, DOD, Gender, Monthly Benefit, Reserve, and Total Paid/Booklet/Premium &
LTD	500+ :	Claims for last 3 years/rate history
LTD	300+ Voluntary:	Same as 500+ above
Dental	100+:	Premium & Claims/rates/booklet
Vision	1,000+:	Premium & Claims/rates/booklet

\* Accident / Hospital Indemnity / Critical Illness / Cancer

\*\* EE-Employee / ES Employee Spouse / EC Employee Child(ren) / Family

**Underwriting may require additional information depending on the case specifics.**