

Name of company

Contact name

Anyone presently off with a disability? (either LTD, WCB/WSIB or UIC/EI)
or has there been a disability case opened or closed in the past 5 years

Group Insurance plan at present?

Renewal Date?

Number of years with carrier? (if less than 2 years - before that ?)

Name of insurer?

Name of broker?

Do all staff (on the plan) work over 25 hours/week & over 9 months/year?

Are any staff compensated by commission? Who & How?

Are employees covered by WCB/ WSIB ?

How many full time staff are employed now?

How many full time staff was there a year ago?

Are staff on the plan true employees? (as opposed to sub contractors)

How long has the firm been in business?

Type of business?

How many staff are related to the owner(s)?

Will the employees be sharing the cost of the premium?

- | | | | |
|----------------|-----|-------------------|-----|
| •Experience | [] | •Authority Letter | [] |
| •Present rates | [] | •Last years rates | [] |
| •Census | [] | | |