

Underwriting Transmittal Form

NON UNDERWRITTEN RATE: This rate work up is not reviewed by a member of our Underwriting Risk Assessment Team. This is not a final rate and is subject to change.

Requirements needed to generate a final rate & bind coverage:

- Open Enrollment Spreadsheet with complete and accurate information reflecting the enrollment forms completed and signed by the employee. If not applying for coverage, please fully complete a waiver.
- Completed Plan Sponsor (Employer) Statement.
- Completed Underwriting Transmittal Form.
- Sold Proposal for the Underwriting Risk Assessment Team to review and use to build the final rates.

Case Information

Company Name _____
Tax ID _____ Requested Effective Date _____

Overwrite Information

Overwrite Name _____ Allied GA Number _____
Commission Percentage for GA _____
Phone number _____ Email _____
Contact Person Name _____ Email _____
Special Instructions _____

Agent Information

Commission Agent #1 Name _____ Allied Agent Number _____
Commission Percentage _____
Agent #1 Phone Number _____ Agent #1 Email _____

Commission Agent #2 Name _____ Allied Agent Number _____
Commission Percentage _____
Agent #2 Phone Number _____ Agent #2 Email _____

Contact Person Name _____ Email _____
Special Instructions _____