WEA trust
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LIFE INSURANCE PROPOSAL
INFORMATION CHECKLIST

The following is a list of the information needed to provide a WEA Trust Life proposal.

	PROPOSAL FOR ALL GROUP SIZES
	CENSUS: Current census, including salaries, age, and gender, for the entire eligible group being quoted, including active members, inactive members, retirees, and waived members.
	PLAN DESIGN: Current Benefit Summary for all groups requesting a proposal. Include if the plan is contributory or non-contributory and the current insurer.
	RATE HISTORY: Three years of premium rate history for each rate class offered.
	WAGE AND TAX FORM (UC-101): Include a copy of the most recent report, itemizing all employees (full-time, part-time, seasonal, termed, etc.). For terminated employees, include the date of termination. For new employees, provide the date of hire.

Note:
Complete submissions must be received by the 10th of the month for coverage to be effective the first of the following month.