



Checklist For Proposal Requests

How to Get the Best FDL Quote

Data Needed for all Life and Disability Proposal Requests

- General (electronically preferred)
 1. Agency Name
 2. Client Name, situs state and no. of employees
 3. SIC code or Industry description
 4. Employer contribution
Percentage for Life, STD and LTD
 5. Commission, if other than standard
- Census (electronically preferred)
 1. Date of birth
 2. Gender
 3. Benefit Schedule
 4. Occupation (LTD only)
 5. Salary and salary mode (if applicable)
 6. Class (if applicable)
- Copy of current benefit booklet or contract and plan design to quote (if different than in-force)
- Current rate

Data to submit for a proposal for groups with 200 or more eligible employees.

- A:** Premium and rate history for the last 3 – 5 years
Separated by year and line of coverage
Claims history for the last 3 – 5 years
- Separated by year and line of coverage
 - Dollar amount of each claim
 - Paid and pending waiver of premium claims (if applicable)
- Benefit changes in the last 3- 5 years
- B:** Premium and rate history for the last 3 – 5 years
Separated by year and line of coverage (optional for LTD under 500 lives)
Open/Closed claim report for the last 3 – 5 years (Separated by year & line of coverage for open & closed claims)
- Date of disability
 - Age of claimant
 - Prognosis, if known
 - Nature of disability
 - Benefit
- Benefit changes in the last 3 -5 years

# Employees	Life/ADD	STD	LTD
200-299		A	
300-499		A	B
500+	A	A	B

The requested data listed is necessary to evaluate the benefit plans based on group size. If the data is available, regardless of group size, please submit it for your best proposal.

Additional Information (If applicable):

- Carrier history for the last 3-5 years
- Pooling point
- Description of current funding arrangement
- Reason group is out to bid
- Any other pertinent account information

NOTE: Proposals can be submitted via e-mail to:
info@nciainsurance.com

Administrative Office:
NCIA
840 First Street, NE
Washington, DC 20065

Groups with 2 - 9 employees submit request to:
Sherri Barrett
Administrative Assistant, NCIA Trust & Voluntary Proposals (up to 50 lives)
(202) 680-7077
info@nciainsurance.com

Groups with 10 - 49 employees submit request to:
Bobby Moore
info@nciainsurance.com
(202) 680-7078

Groups w/50 or more employees submit proposals/new business requests to:
Danielle Leclerc
Marketing Services Coordinator, FDL
(678) 320-6817 or (888) 392-4020
danielle_leclerc@fdlic.com
200 Ashford Center North, Suite 240
Atlanta, GA 30338