



Quote Checklist for Trustmark Products

You're on your way to offering the coverage your clients need with the exemplary service you've come to expect from Trustmark. To get started, here's a list of the information we'll need to get your best quote:

Broker/Producer individual's name

Broker/Producer Agency name

Employer information:

- Name
- Headquarters' City/State
- Benefit administration platform
- Enrollment method (i.e. enroller assisted, call center, group meetings, mandatory, passive)

Census with eligible employees:

- Gender
- Date of hire
- Salary
- Date of birth



Current voluntary carrier information:

- Attach plan design or brochures (include rates, rate tiers and benefit amounts for employee and dependents)
- Payroll deduction frequency
- Eligibility periods & audience (include part-time employees)
- Hours worked per week
- Desired effective date

**You care.
We listen.**

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400 Field Drive
Lake Forest, IL 60045
trustmarkvb.com Social media icons for LinkedIn, Twitter, Facebook, and YouTube.

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