



Request for Quotation Checklist

In order to process your request for quotation in a timely and efficient manner, we require the following information:

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| 1 | Complete Request for Quotation form. We can provide you with a supply of our Request for Quotation forms, or your own form can be modified to include the information requested on our form. | <input type="checkbox"/> |
| 2 | Employee Data. This needs to include: <ul style="list-style-type: none">➤ Date of birth➤ Gender➤ Occupation
Please be as specific as possible regarding the individual's job description. If an individual is the owner, please provide the actual job description.➤ Salary➤ Date of hire➤ Classification (i.e. class number indicator)➤ Health and Dental coverage status➤ Province of residence➤ Confirmation whether or not salary includes commission➤ Confirmation whether any employees on the list are disabled | <input type="checkbox"/> |
| 3 | Three-year rate history, including the most recent renewal rates for groups with current coverage. | <input type="checkbox"/> |
| 4 | Three-year claims experience history for groups with current coverage. | <input type="checkbox"/> |
| 5 | If you are not filling out our Request for Quotation, please provide a detailed plan design description. | <input type="checkbox"/> |
| 6 | Copy of the schedule of benefits from the most recent employee benefit booklet is preferred. If variations from the standard A.S.G. plan design are required, please provide a copy of the entire current employee benefit booklet. | <input type="checkbox"/> |

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