



**KANSAS CITY LIFE**

**GROUP BENEFITS**

### What is needed to get a TRADITIONAL Quote?

- Email RFP to : [jennifer.duggins@kclife.com](mailto:jennifer.duggins@kclife.com)

### Here's what's needed:

- Group name/address/nature of business or SIC
- Proposed effective date
- Agent compensation requirements
- Employer contribution status by line of coverage
- Current plan design (booklet/certificate/policy preferred)
- Current/renewal/competitor rates
- If voluntary, copy of current bill or roster with participation by line
- Census requirements:
  - Life: DOB/Gender
  - STD: DOB/Gender/Salary
  - LTD: DOB/Gender/Salary/Occupation
  - Dental: DOB/Gender/Number of eligible employees
  - Vision: DOB/Gender/Number of eligible employees

### What is needed to get a Defined Contribution Plan Quote:

*Offered by National MGA & Underwritten by Kansas City Life*

- [www.yatesinsurance.com / Defined Contribution / DC Plan Group Quotes](http://www.yatesinsurance.com / Defined Contribution / DC Plan Group Quotes)

- find the SIC code for your group / and then print or save.

### Experience Requirements for traditional quotes

Life	250+ participants:	Premium & Claims/Approved PW claims/rates/booklet
STD	100+ participants:	Premium & claims/rate/booklet Number of open and closed claims for last 3 years
LTD	300-999 participants:	Open & Closed claims for 3 years/w DOB, DOD, Gender, Monthly Benefit, Reserve, and Total Paid/Booklet/Premium & Claims for last 3 years/rate history
LTD	1,000+ :	
LTD	300+ Voluntary:	Same as 1,000+ above
Dental	100+:	Premium & Claims/rates/booklet
Vision	1,000+:	Premium & Claims/rates/booklet

**Underwriting may require additional information depending on the case specifics.**