

Proposal Checklist

Providing complete information on a Request for Proposal helps us to accurately and objectively quote your group life insurance plan. Here is a list of the items we find most helpful in order of priority from “need to have” to “nice to have.”

General

- Name of company
- Objectives/Reason for possible change in plan
- Coverage type(s) requested:
 - Variable Group Universal Life
 - Group Universal Life
 - Basic Term Life
 - Optional Term Life
 - Accidental Death and Dismemberment
 - Business Travel Accident
- Copy of current policy
- Request for Proposal deadline
- Implementation/Enrollment deadlines

Census of eligible employees

- Date of birth
- Gender
- Annual salary
- Basic and optional amount of coverage per employee or multiple of salary
- Cash value account balance per employee (cash value plans only)
- State of residence

Plan design

Description of current and requested plan designs for each coverage requested, including:

- Guaranteed issue requirements
- Plan maximums
- Open enrollment requirements
- Portability definition
- Waiver of Premium definition
- Age reductions
- Exclusions

Financial

- Three years of financial experience (premium and claims) for each line of coverage
- Current rates and rate history
- Type of funding requested (participating or nonparticipating)
- Service guarantees

Submit your quote request

By mail:
Minnesota Life Group National Sales Office
400 Robert Street North
St. Paul, MN 55101-2098

By fax:
(651) 665-7898

If you have special requirements or questions, don't hesitate to call us at 1-800-606-LIFE (5433).



MINNESOTA LIFE

Minnesota Life Insurance Company
A Securian Financial Group Affiliate

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F44057-3 Rev 5-2006
A03574-1005