

NEW CASE TRANSMITTAL FORM

Attention: Incomplete Case Submissions Experience Delays

Have you checked this case? Are all questions answered completely and appropriately? Have you checked rates and completed the benefits portion of the Employer Application? Do we need waiver cards?

Failure to present a properly completed case will result in underwriting delays. Properly completed cases will be given first priority, regardless of the sequence they arrive in our office. Incomplete cases cost you and Allied valuable time and put commissions on hold until the case is written. Your thoroughness is well worth the time taken. **This completed sheet MUST accompany the submitted case.**

Overwrite Information

Overwrite Name & Allied or American General Number:
(Use overwrite stamp)

American General GA Number _____
Telephone No. _____
Fax No. _____
E-mail _____
Person to Contact _____
Date _____
Special Instructions _____

Agent Information

Agent Name _____
Allied or American General Agent Number _____
Producing Agent _____
Agent's **Street** Address _____
Agent's City, ST Zip _____
Agent's Phone No. _____
Agent's Fax Number _____
Agent E-mail _____
Agent's SSN/Tax ID. No. _____
Special Commission Arrangements _____

Case Information

Case Name _____
Case Contact Name _____
Case Address _____
Case City, ST Zip _____
Case Phone No. _____
Case Fax No. _____
Contact Person's Extension _____
Contact Person's E-mail _____
Requested Effective Date _____
Other _____

Enclosed

All of these **MUST** be included:

- Employer Application—Fully completed and signed by an owner, officer or partner.
- Individual Applications—Fully completed and signed in ink.
- For CoreValue Health Plan - Employee Voluntary enrollment forms if required.
- Waiver Cards—Employee OR Dependent—Must show spouse's name and spouse's place of employment (if applicable).
- Complete copy of most recent State Quarterly Unemployment Tax Report.*
- Imprinted company check for first month's costs made payable to Allied National.
- Copy of final quote used for sale.
- Appointment information.
- Continuity of Coverage Requirements: Health and dental products with takeover benefits require proof of prior coverage. Certificates of Creditable Coverage and/or current and prior carrier bills are **required**. See proposal or brochure for what is required for this particular case submission.**

*Refer to Agent Guide for product specific requirements.

**For dental submissions, the actual copy of the prior carrier's Certificate of Coverage is required.



Underwriting Department

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