



Headquarters: 6200 S. Gilmore Road, Fairfield, OH 45014-5141
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cinfin.com 513-870-2000

Worksite Case Qualifier

Agent name Phone Email
Agency name Agency code
Name of employer
Type of industry Total number of eligible employees
Primary contact at employer Phone
Primary location of employer Street City State ZIP Code

Are there multiple state locations? If yes, indicate what states
Are all state licensing and appointment requirements fulfilled for agency and writing agents?

Applications will not be accepted for states where licensing and appointment requirements have not been met. Please contact licensing at 513-870-2257.

Agency relationship to employer: Commercial account with CIC, Personal Lines referral, Group benefits account, Commercial account with other, Other:
Enrollment: Face to Face, Virtual, Combination: Face to face % Virtual %
Enrollment type: Paper, Electronic

Will products be offered in addition to Cincinnati Life products? Yes No
If yes, what types of coverage are being offered?
Will group meetings be scheduled?
Will mandatory one-on-one meetings be scheduled?
Will the employer provide a contact person to support you during the enrollment?
Do you have a target date for enrollment? If yes, when? (Should be within 60 days)
Will a strategic partner be enrolling this case? If so, what is the premium split?
Are you going to use any additional staff/enrollers during enrollment?
If yes, who? All enrollers must be life licensed.

How will premiums be paid? 100% employee contribution, All/partial employer contribution
How are employees paid? W2, 1099

Please check all deductions frequencies that apply:
(based on the employer's frequency of insurance deductions, not number of pay periods)
Weekly (52), Bi-weekly (26), Semi-monthly (24), Monthly (12), Monthly bankdraft

Additional comments:

Fax or email completed form to your life sales field or worksite marketing representative.