

Starting your client's cover

Thank you for choosing to place your client's policy with Unum. We look forward to working together, helping your client register for our many added-value services so they can make the most of their policy. All you need to do is:

NO APPLICATION FORM REQUIRED

1 Send an email confirming the quote you would like to accept together with any outstanding information to your Unum Account Manager – see our Checklist for the details of what we need.


- ➔ Our Group Policy Servicing team will send you an email (usually within 48 hours) to confirm your client's policy has been set up
- ➔ Your Unum Account Manager will send you a link so you and your client can register for a Wellbeing Ready session

2 Provide us with up-to-date membership data and your client's completed Direct Debit form (within 30 days of step 1).

- ➔ We'll issue policy documents and accounts

3 Attend our 30-minute online Wellbeing Ready session with your client.

- ➔ We'll explain the benefits of all the wellbeing and support services that are included with your client's policy. Click here for more information and to [book a session](#).

 Please remember to send us all the information listed on the last page of your client's quote

Checklist

Details of all the information we need in your email is included on the quote we sent you – this checklist is a handy reminder. To make things easy, and to ensure there are no delays in setting up cover, you don't need to complete an application form – simply email your Unum Account Manager confirming the required information and attach the relevant documents. We'll need:

- Accepted quote reference number
- Company name, address and Companies House number
- Policy start date and renewal date
- Details of any subsidiary companies to be included in the scheme
- Whether your client will be paying their premiums monthly or annually
- Details of any changes to membership since you received the quote
- Any other information noted under 'caveat terms' on the last page of the quote

For Switch schemes only

- Any special terms applied, members who have been excluded, restricted or declined entry by any previous insurers. If you have medical underwriting letters, you can simply attach these to your email.

For Group Life schemes only

- Any long-term absentees (employees who have been absent from work due to illness or injury for three months or more)
- Whether your client will be using their own trust or the relevant Unum Master Trust and if so, the relevant [Notice of Participation form](#)

Within 30 days

We'll need:

- Updated membership data (if applicable)
- The completed Direct Debit form. If your client is unable to pay by Direct Debit, please confirm they will pay by BACS.

Talk to your client about medical underwriting

Once we have your client's up-to-date membership data, we let you know if any members require medical underwriting.

If you have any questions about setting up your client's policy, please contact your Unum Account Manager.

For more information about Unum and the services we offer, visit unum.co.uk

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Page 2 of 2