Starting your client's cover

Three simple steps to setting up a Unum policy

Thank you for choosing to place your client's policy with Unum. We look forward to working in partnership with and your client to help them register for our many services and start making 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 including any outstanding information to your Unum Sales Consultant – see checklist below

- Our Broker Services Team will send you an email (usually within 24 working hours) to confirm your client's policy has been set up
- Your Unum Consultant will invite you and your client to the Onboarding session

2

Provide up-to-date membership data and completed direct debit form (within 30 days of step 1)

- We'll issue policy documents and accounts

3

Attend our 30-minute online Onboarding session for you and your clients.

- We'll explain the benefits of all the wellbeing and support services that are included with your client's policy. The session includes a Q&A and useful downloads to make sure they can register straight away.

Please remember to include all information noted on the last page of the quote

Checklist

Details of all the information we need is included on the quote we sent you – here is a checklist to remind you so there are no delays in setting up your client's policy. To make things easy, you don't need to complete an application form – simply email your Unum Consultant confirming the required information and attach the relevant documents. We'll need:

- The reference number of the quote you are accepting. If easier for you, simply attach the quote to your email
- If you didn't provide it before, company name, address and companies house number of the company and any subsidiary companies associated with the policy
- The date you want cover to start (the policy start date) and the policy anniversary date (also known as the renewal date)
- Whether premiums are to be paid annually or monthly and the commission basis to apply
- Confirmation of whether membership has changed. If membership has changed since the quote was completed, please let us know and send us the new data within 30 days
- Any other information noted under 'Terms' on the last page of the quote

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, if it's easier for you

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

For the onboarding session

- Details of who will be attending the online session and confirm whether you want us to invite your client on your behalf, and if you'll also be attending the session.
- If you would like us to send the invitation directly to your client, and start registering them for the wellbeing and support services, please provide your client's first and last name and email address

Within 30 days

We'll need:

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

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

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