Name
Marcus Webb

Email
marcus.webb@lincoln.com

Phone
(212) 555-0107

Role
Account Executive

Would you like to add another contact?
Yes

Contact Name
Danielle Foster

Contact Email
danielle.foster@lincoln.com

Contact Phone
(212) 555-0166

Contact Role
Account Executive

Offered Lines of Coverage
- Dental

Broker Agency Name
Summit Ridge Benefits Group

Agency Contact Name
Jordan Ellison

Agency Contact Role
Broker

Agency Contact Email
jordan.ellison@summitridgebenefits.com

Broker Office Phone
(312) 555-0148

Would you like to add another contact?
Yes

Contact Name
Priya Raman

Contact Phone
(312) 555-0192

Contact Email
priya.raman@summitridgebenefits.com

Broker Address
United States

Send Proofing Form to
Broker

Send Handoff Email to
Broker

What enrollment platform is this group using?

Employee Navigator

Company Name

Brightpath Freight Co.

Benefit Renewal Month

January

Company Address

United States

Does this group have Spanish speaking needs?

No

Is this an UpWise client?

No

Benefit Plan Eligibility

Full-time employees only

Waiting Period for Full Time

Date of Hire

Is coverage available to spouses or dependent children?

Yes, spouses and dependent children are eligible

Would you like to include a COBRA notice in your video after the program eligibility section?

No

Total number of medical plans

1

Medical Plan 1 Document Type

Benefit Summary

Do you have more than one benefit class?

No

Total Benefit Classes

2

Contact Sheet

- Broker

Authorization

✔ I certify that I am an authorized representative of Lincoln Financial and am authorized to request O'Eme services for this client. I acknowledge that this request is submitted pursuant to the applicable agreement between Lincoln Financial and O'Eme and authorize O'Eme to proceed with implementation based on the information provided. I further certify that the information submitted is accurate to the best of my knowledge.

Submitted by:

Marcus Webb