Name
Jeremy Parr

Email
jparr@lfg.com

Phone
(904) 555-8888

Role
Account Executive

Would you like to add another contact?
No

Offered Lines of Coverage
- Dental
- Vision
- Life Insurance
- Voluntary Life Insurance
- Voluntary Short Term Disability
- Voluntary Long Term Disability
- Hospital Indemnity
- Accident
- Critical Illness

Marked Lines of Coverage
Hospital Indemnity, Accident, Critical Illness

Voluntary New Lines of Coverage
Hospital Indemnity, Accident, Critical Illness

Broker Agency Name
Pro Benefits Plus

Agency Contact Name
Ed St. Jean

Agency Contact Role
Broker

Agency Contact Email
ed@probenefitspluc.com

Broker Office Phone
(410) 826-5505

Would you like to add another contact?
No

Broker Address
United States

Send Proofing Form to (Legacy)
Broker

Send Handoff Email to (Legacy)

Broker

What enrollment platform is this group using?

Employee Navigator

Company Name

CC golf Inc

Benefit Renewal Month

January

Company Address

United States

Does this group have Spanish speaking needs?

No

Is this an UpWise client?

No

Invite HR to EMOD™ Script Review

No

When Sherp™ engages with employees, at times he needs to bring in human support. With the employees permission, he will share a summary of the employees need along with basic contact information. Please select who should receive these communications:

HR Only

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

Upload Benefits

- Benefit-Summary-Lincoln-Voluntary-STD-_-60-to-1000k.pdf

- Benefit-Summary-Lincoln-Voluntary-LTD-_-60-to-5000k.pdf
- Benefit-Summary-Lincoln-Vol-Life-_-500k-150k-GI.pdf
- Benefit-Summary-Lincoln-Vision2.pdf
- Benefit-Summary-Lincoln-Hospital-Indemnity1.pdf
- Benefit-Summary-Lincoln-Employer-Paid-Life-_-10k.pdf
- Benefit-Summary-Lincoln-Dental2.pdf
- Benefit-Summary-Lincoln-Critical-Illness2.pdf
- Benefit-Summary-Lincoln-Accident2.pdf

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:

Ed