

ACEC Life/Health Trust
Administered by UnitedHealthcare
Quoting & Installation Checklist
2-50 size firms
Quoting an ACEC group:



2-50 size ACEC Quotes are run on UnitedeServices

- o Agents can submit RFP's to: acec_sb_quotes@uhc.com
 - Request an ACEC Proposal in the body of email

Underwriting Guidelines

- o Groups with 10 or more enrolling employees and existing group coverage:
 - Group Name/Group Address/Group Tax ID/Name of Prior Carrier
 - Grx Compatible Census
- o Groups with under 10 enrolling employees and/or virgin cases:
 - Group Name/Group Address/Group Tax ID
 - Grx Compatible Census

Installation Requirements:

Submit Installation material to ACEC Account Executive

- o **Sr. Account Executive:**
 - **Josh Fleming:** Joshua.Fleming@uhc.com
- o **Account Executive:**
 - **Daniel Martinez:** Daniel.A.Martinez@uhc.com

Paperwork and UHC Enrollment File Needed:

- o **Employer Application** - Illinois 100+ Employer Application
- o **Prime Enrollment Spreadsheet**
 - Required Columns: A, B, C, D, E, G, H, N, O, P, Q, V, W, AA, AB
 - If Applicable: X, Y, AG, AH, AJ, AK, AM, AP, AR, AS, AT, AV, AW, AX, AZ
- o **Copy of the Sold Quote**
- o **Product Selection Form**
- o **ACEC Participation Agreement**
- o **Confirm the firm has joined or joining the ACEC Association**
- o **Confirmation that Agent/Agency has an IL Non-Resident License**
 - Brokers are required to be licensed in Illinois to receive commission on ACEC Life/Health Trust business
- o **Payment Options**
 - **Direct Bill** – Requires a pdf copy of the binder check for installation
 - Check made payable to UnitedHealthcare
 - Complete binder check cover sheet & mail to either address below
 - **Direct Debit** – No binder check required

If using Regular Mail:
ACEC Life/Health Trust
Dept. CH 14382
Palatine, IL 60055

Overnight Mailing Address:
ACEC Life/Health Trust
Dept. CH 14382
5505 N. Cumberland Ave Ste: 307
Chicago, IL 60656-1471

Please Note:

- ACEC Life/Health Trust rates are contingent that the firm is an active dues paying member of ACEC
- The rates generated in UnitedeServices are firm, unless there is a +/- 10% change in membership or if the demographics change by more than 10%, which would cause us to re-rate the group based on the final census.
- The firm can select up to 2 plan designs (within 50% financial spread)