

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

- Agents can run their own proposals on [UnitedeServices](#)
 - Input Franchise Code 6550000 in the Quote Information section of United eServices
- Agents can submit the RFP to their UHC quoting mailbox
 - Request an ACEC Proposal in the body of email

Installation Requirements:

Submit Installation material to ACEC Regional Account Executive assigned to your region. (CC: Your UHC AE)

- **Regional Account Executives:**
 - **Josh Fleming:** Joshua.Fleming@uhc.com
 - Markets: AL, AR, CT, DE, FL, GA, IL, IN, KY, LA, MA, MD, ME, MI, MN, MS, NH, NJ, NY, NC, OH, PA, RI, SC, TN, VT, VA, WV, WI
 - **Matt Leimbek:** Matthew_Leimbek@uhc.com
 - Markets: AK, AZ, CA, CO, HI, ID, IA, KS, MO, MT, NE, NV, NM, ND, OK, OR, SD, TX, UT, WA, WY

Paperwork and UHC Enrollment File Needed:

- Employer Application - Illinois 100+ Employer Application
- **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
- Sold Quote & Product Selection Form
- ACEC Participation Agreement
- Confirm the firm has joined the ACEC Association
- **Confirmation that Agent/Agency has an IL Non-Resident License**
 - The ACEC Life/Health Trust is situated in the state of Illinois. Brokers are required to be licensed in Illinois to receive commission on ACEC Life/Health Trust business.
- **Binder Check – Payable to either UnitedHealthcare or the ACEC Life/Health Trust**
 - Electronic copy required for installation
 - Please send only the original binder check to the below address for processing.

If using Regular Mail:
ACEC Life/Health Trust
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)
- CORE Plans are available to member firms with 90%+ of membership located in an approved CORE Zipcode