



# MGA GROUP BENEFITS INC.

## QUOTE REQUEST CHECKLIST

### 1. Group Quote Request Form

Please complete our six-page request form

---

### 2. Employee Census Information

All eligible employees must be listed on the census data. Please complete with as much detail as possible.

**Note:** Census data is available as an Excel spreadsheet and can be submitted electronically. This is particularly helpful when dealing with larger groups, as the underwriters can cut/paste the information from the spreadsheet to their systems, thereby expediting the quoting process.

---

### 3. Current Carrier Information

Provide copies of the following:

- Sample of current/existing policy (plan booklet) for plan design information
- Current rates and/or Renewal rates
- Claims experience (premium vs. claims) going back 3 complete years and should not be older than 6 months
- Rate history going back 3 complete years (must coincide with the periods provided in the experience reports)
- Health claims for any individual over \$5,000 (total dollars, along with any further details you are able to provide)
- A copy of a recent invoice/billing statement

**Note:** If any of the above is missing, this will delay the processing of your quote. Please include any additional documentation available to assist underwriting

---

### 4. Submit Quote Request to MGA Group Benefits Inc.

The above documents may be submitted by fax, email, or mail.

Fax all documents to: **905-361-1976**

Email: [quotes@mgagroupbenefits.com](mailto:quotes@mgagroupbenefits.com)

Or mail to: **MGA Group Benefits Inc.**  
200 Matheson Blvd. W., Suite 106  
Mississauga, ON L5R 3L7

**Note:** Once all documentation is completed and submitted, new group quotes are often processed in 7-10 business days. Underwriting may require up to 15 business days to process quotes for groups that have current coverage. These times are estimations and may vary. Depending on the situation, underwriting may require additional documentation.