

Agent of Record

Information Package





Welcome to ClearBenefits.ca

Thank-you for choosing to work with ClearBenefits.ca.

ClearBenefits.ca as your Servicing Agency

ClearBenefits.ca is a web-based Group Benefits provider, developing, distributing and managing a complete range of Group products and services from exclusive pooled programs to brokerage and management of traditional Group Benefits programs and more.

Marketing Authorization

Selecting the Marketing Authorization option lets Group Benefits providers know that you have chosen to work exclusively with Dale Campbell of ClearBenefits.ca to obtain quotes on your behalf for your business. This does **NOT** affect Agent of Record status for an existing plan.

Agent of Record

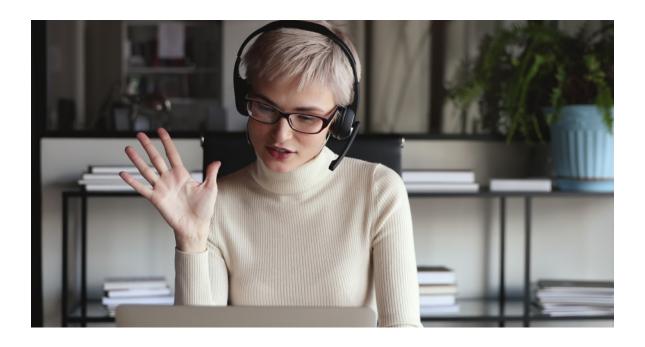
Selecting the Agent of Record option is direction to your current Group Benefits provider that you are choosing to appoint Dale Campbell of ClearBenefits.ca as your Agent of Redord.

Transfer Process

The transfer takes 5— 10 business days. Once the transfer is complete, you will receive a call from our office to welcome you, and work with you on any immediate issues there may be.

Please complete and return the form on the last page of this PDF on your company letterhead to our office for processing





Administration & Support

Service to Simplify Administration

Our dedicated service staff are your direct contact, and will be in touch with you on a regular basis.

ClearBenefits.ca service process is designed to keep your plan current while containing costs and effectively eliminating common administrative issues that can arise.

Initial Service Issues?

- Definition of eligible staff, waiting period etc.
- Permanent full-time staff not currently on the plan
- Missed staff or late applicants
- Staff on; disability, maternity / paternity leave or leave of absence
- Update salaries
- Update family status of staff
- Over-age dependents attending post-secondary (ages 21 25)
- Staff with severance benefits
- Establish a policy for benefits during various employment situations (ie. disability etc.)





Getting started...

Please complete and return the form on your company letterhead to: connect@clearbenefits.ca

Your completed "Agent of Record" letter will appoint your ClearBenefits.ca as your servicing agency.

This becomes effective within 5— 10 business days.

Once the change is complete, you will receive a call from our office to welcome you, and address any initial service issues.

Thank-you for choosing to work with ClearBenefits.ca.



Agent of Record Notification

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insurance companies, othe	r organization	ns underwriting s	nc to market our account(s) to other such plans or wholesale brokers on my ked by the undersigned in writing.
Agent of Record			
authorizes to become our s	ervicing agen	ncy for the purpo	ts.ca Inc. as our Agent of Record, and ses of providing service, soliciting Employee Benefits Program.
	fits.ca Inc. wit	th any informatio	ny or other organization underwriting such on as may be requested regarding existing of Employee Benefits plan.
,	Agent of Red	cord with respec	inizations to recognize t to any such plans, and to pay any
ClearBenefits.ca and it's associ brokers to prepare proposals	ates, insurance and services inc	companies, other o cluding employee be	ed for the purpose of allowing Insurance providers, rganizations underwriting such plans or wholesale enefits, and other related products and services. only be used for these purposes.
Dated at	this	day of	/ 20
Client Authorized Signature		-	
Name & Title		_	
Company Name		-	
Insurance Carrier & Plan #		-	