

Checklist For Employee Benefits Insurance Takeover



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- Group insurance application form
 - Authorisation form/letter with your company letterhead
 - A copy of NRIC/Passport of the authorised person
 - Insurer-generated employee listing with plan allocation info
(generated by your existing insurance company)
 - Employee listing (using a mandatory, insurer-specific template that we will provide)
 - Claim history over the past 3 years (.xls or .xlsx file)
 - Full copy of existing group insurance policy contract
 - Employee health declaration form (This is mandatory only if you don't have the minimum headcount required by your chosen insurer.)
 - Organisation chart