



ClearBenefits.ca

# Agent of Record Information Package



## Welcome to ClearBenefits.ca

Thank-you for choosing to work with [ClearBenefits.ca](http://ClearBenefits.ca).

### **ClearBenefits.ca as your Servicing Agency**

[ClearBenefits.ca](http://ClearBenefits.ca) is your complete Group Benefits provider, developing, distributing and managing a complete range of Group products and services from exclusive pooled programs to brokerage of traditional Group Benefits programs and more.

### **Agent of Record**

An Agent of Record letter is direction to your current Group Benefits provider that you are choosing to appoint [ClearBenefits.ca](http://ClearBenefits.ca) as your servicing agency.

### **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](http://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:

[service@clearbenefits.ca](mailto:service@clearbenefits.ca), or toll free fax: 1.888.692.0113

Your completed “Agent of Record” letter will appoint your [ClearBenefits.ca](https://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](https://clearbenefits.ca).

# Agent of Record Notification

This letter appoints [ClearBenefits.ca Inc.](#) as our Agent of Record, and authorizes to become our servicing agency for the purposes of providing service, soliciting quotations and negotiating on our behalf in regard to our Employee Benefits Program.

This is our authorization to any insurance company or other organization underwriting such plans to supply [ClearBenefits.ca Inc.](#) with any information as may be requested regarding existing plans, possible future plans, or quotations on our Employee Benefits plan.

This also constitutes our request to any such organizations to recognize [ClearBenefits.ca Inc.](#) as Agent of Record with respect to any such plans, and to pay any commissions that may be due on such business.

"Information collected by [ClearBenefits.ca](#) and it's associates is used for the purpose of allowing Insurance carriers, [ClearBenefits.ca](#) and it's associates to prepare proposals and services including employee benefits, and other related products and services. Information collected will remain confidential and only be used for these purposes."

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ / 20\_\_

\_\_\_\_\_  
Client Authorized Signature

\_\_\_\_\_  
Advisor

\_\_\_\_\_  
Name & Title

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
[ClearBenefits.ca Inc](#)

\_\_\_\_\_  
Insurance Carrier & Plan #