

Group Insurance Underwriting Assessment Template

1. Group and Policy Details

Client/Group Name: _____

Proposed Effective Date: _____

Type of Policy: _____

Broker/Agent Name: _____

Number of Lives: _____

2. Coverages Requested

Coverage Type	Sum Assured	Remarks
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3. Group Characteristics

Nature of Business: _____

Geographical Location(s): _____

Average Age: _____ Age Range: _____

Gender Split: _____

Staff Turnover Rate: _____

4. Claims Experience

Year	No. of Lives Covered	Claims Incurred	Premium Paid	Loss Ratio (%)
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Comment on Claims History:

5. Underwriting Assessment

Risk Factors Identified:

Suggested Underwriting Actions:

Special Terms/Conditions:

6. Approvals & Remarks

Underwriter's Name: _____

Date of Assessment: _____

Additional Comments/Notes: