

# Client Checklist



## STEP 1

### CLIENT INFORMATION

Please enter all information in the fields to the right.

CLIENT NAME

CLIENT EMAIL

CLIENT PHONE NUMBER

NUMBER OF EMPLOYEES

#### CHECK THE ITEMS REQUIRED

ADDITIONAL  
VERSION\*

SPANISH  
VERSION

8-Page Benefit Guide (3 credits)

8-Page Interactive eGuide (3 credits)

4-Page Benefit Guide (3 credits)

#### THE FOLLOWING ARE ONE CREDIT EACH

Poster

Postcard

OE Flyer

Rate Sheet

QEX/Made For You Flyer

Table Tent

HDHP Flyer

HDHP Mailer

New Benefits Flyer

PPO Flyer

HMO Flyer

Choose the Right Provider Flyer

HRA Flyer

Payroll Stuffer

Brainshark Video Library

#### THE FOLLOWING IS TWO CREDITS

Benefit Spot\*\*

TOTAL NUMBER OF CREDITS USED: \_\_\_\_\_

\*Additional versions are two credits each.

\*\*Additional versions are one credit each

## STEP 2

### PROJECT INFORMATION

# 12

#### CREDITS AVAILABLE

Congratulations, you have 12 communication credits available to get you started! Use the list to the left to manage your deliverables. If you need additional items, please reach out to your HUB Account Manager, who will be more than happy to discuss your options.

DID YOU SEND THE COMPANY LOGO (AS .JPEG, .EPS OR .AI)?

YES

NO

FINAL MEDIUM

PDF

PRINTED\*

FINAL NEEDED BY\*\*

\*Please allow an additional week if professionally printing.  
\*\*Expect a two-week turnaround time between initial draft and final product.

KEY MARKET