

Transcript: VICTORIA

Taylor-4822923467341824-6163642403045376

Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Hi. Am I speaking with William? Yes, you are. Hey. This is Victoria with Benefits on a Card. Uh, we administer the medical insurance for Hamilton Reifergroup. Yes, ma'am. Hey. So, I'm just looking at a enrollment form that you signed and dated, um, it looks like on the 26th of February, a few days ago. Yes, ma'am. Um, on the form I see you selected dental and vision for employee only and then the term life for employee plus spouse? Yes, ma'am. Okay. So on the original form, we were missing your spouse's information, but it looks like we got an additional form where we have it, so I just wanna verify. Um, your spouse's name is Catherine S. Mathis. Date of birth is May 27th, 1959? Yes, ma'am. And then social is 408-11-8767. Yes, ma'am. Okay. And then it looks like you also want her to be the beneficiary for the term life. Yes, ma'am. Okay. Perfect. Uh-huh. All right. Well, that is all that I need to verify on my end. Okay. Um, yeah, I appreciate that. The reason I do it that way, excuse me, is, uh, I, I have 100, um, 100% no copay at VA. Mm-hmm. Um, so they take care of all my medical, uh, *****, you know, I- I have some that they, they take care of 'cause it's service related, but my primary care, everything is through VA. But, uh, well, I, I haven't been happy with their vision part of it, and, uh, they only give, uh, dental to 100% disabled, and I'm only 70, so I need the dental. Okay. And, uh, that's why I, I go that route, just so s-... And of course- Okay. ... I want some life insurance, should s- should something happen to me, uh, they won't have to worry about the funeral costs and stuff like that. Uh, but, uh, yes, ma'am. Everything on there th- you just said is correct, and, uh, I definitely appreciate you calling and double checking. Uh, that makes me feel real good about how y'all do things, um, and I appreciate that. Yes, sir. Um, now, I do see that we still have to verify your eligibility with them. Are you, like, a rehire through them? Uh, yeah. I guess that's what- Okay. ... you would say. Yeah, uh, they do, uh, temp services. Yeah. Uh-huh. And, um, I was with them before, and, uh, then, of course- Okay. ... you know, I got a full time job, and then I decided I'm gonna retire, and so I spent about two years doing nothing, and I said, "This, I can't do this. I, I just can't." Uh, I mean, retirement, if, if my wife was ready to retire, it would be okay. But, uh- Right. Yeah. So we're, w- we've got ano- indeed, we're hoping we have another at least seven years before we totally retire, but, uh, we'll see, you know? And, uh, we're, uh, the first thing on our retirement that we wanted to do, neither one of us had ever been on a cruise. Oh. That'll be nice. And so s- yeah, so we said, "Well, when we retire, we'll do that." Well, I retired, and she says, "Time to take the cruise." So w- we're leaving the 30th of March, so, uh- Okay. ... for seven, for seven days. So, uh, I appreciate you listening to the old man, and, uh, if there, is there anything else you need from me? Uh, no. Um, I was, the only reason why I was asking if you're a rehire is just because we haven't gotten the rehire information just yet. But we will get that information and verify that you're eligible to enroll, so, um, from here- Okay. ... we'll take it

from there. Yeah. They're waiting on ***** getting a background check. That's all we're waiting on. Okay. That makes sense. Yes, ma'am. Yes, ma'am. All righty. Perfect. Well, I will just go ahead and make notes that everything you're requesting is correct, and that's all I needed. All right. You have a wonderful day, ma'am. You too. Thank you. Bye. Thank you. Bye.

Conversation Format

Speaker speaker_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker_1: Hi. Am I speaking with William?

Speaker speaker_2: Yes, you are.

Speaker speaker_1: Hey. This is Victoria with Benefits on a Card. Uh, we administer the medical insurance for Hamilton Reifergroup.

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: Hey. So, I'm just looking at a enrollment form that you signed and dated, um, it looks like on the 26th of February, a few days ago.

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: Um, on the form I see you selected dental and vision for employee only and then the term life for employee plus spouse?

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: Okay. So on the original form, we were missing your spouse's information, but it looks like we got an additional form where we have it, so I just wanna verify. Um, your spouse's name is Catherine S. Mathis. Date of birth is May 27th, 1959?

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: And then social is 408-11-8767.

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: Okay. And then it looks like you also want her to be the beneficiary for the term life.

Speaker speaker_2: Yes, ma'am.

Speaker speaker_1: Okay. Perfect.

Speaker speaker_2: Uh-huh.

Speaker speaker_1: All right. Well, that is all that I need to verify on my end.

Speaker speaker_2: Okay. Um, yeah, I appreciate that. The reason I do it that way , excuse me, is, uh, I, I have 100, um, 100% no copay at VA.

Speaker speaker_1: Mm-hmm.

Speaker speaker_2: Um, so they take care of all my medical, uh, *****, you know, I- I have some that they, they take care of 'cause it's service related, but my primary care, everything is through VA. But , uh, well, I, I haven't been happy with their vision part of it, and, uh, they only give, uh, dental to 100% disabled, and I'm only 70, so I need the dental.

Speaker speaker_1: Okay.

Speaker speaker_2: And, uh, that's why I, I go that route, just so s-... And of course-

Speaker speaker_1: Okay.

Speaker speaker_2: ... I want some life insurance, should s- should something happen to me, uh, they won't have to worry about the funeral costs and stuff like that. Uh, but, uh, yes, ma'am. Everything on there th- you just said is correct, and, uh, I definitely appreciate you calling and double checking. Uh, that makes me feel real good about how y'all do things, um, and I appreciate that.

Speaker speaker_1: Yes, sir. Um, now, I do see that we still have to verify your eligibility with them. Are you, like, a rehire through them?

Speaker speaker_2: Uh, yeah. I guess that's what-

Speaker speaker_1: Okay.

Speaker speaker_2: ... you would say. Yeah, uh, they do, uh, temp services.

Speaker speaker_1: Yeah. Uh-huh.

Speaker speaker_2: And, um, I was with them before, and, uh, then, of course-

Speaker speaker_1: Okay.

Speaker speaker_2: ... you know, I got a full time job, and then I decided I'm gonna retire, and so I spent about two years doing nothing, and I said, "This, I can't do this. I, I just can't." Uh, I mean, retirement, if, if my wife was ready to retire, it would be okay. But, uh-

Speaker speaker_1: Right.

Speaker speaker_2: Yeah. So we're, w- we've got ano- indeed, we're hoping we have another at least seven years before we totally retire, but, uh, we'll see, you know? And, uh, we're, uh, the first thing on our retirement that we wanted to do, neither one of us had ever been on a cruise.

Speaker speaker_1: Oh. That'll be nice.

Speaker speaker_2: And so s- yeah, so we said, "Well, when we retire, we'll do that." Well, I retired, and she says, "Time to take the cruise." So w- we're leaving the 30th of March, so, uh-

Speaker speaker_1: Okay.

Speaker speaker_2: ... for seven, for seven days. So, uh, I appreciate you listening to the old man, and, uh, if there, is there anything else you need from me?

Speaker speaker_1: Uh, no. Um, I was, the only reason why I was asking if you're a rehire is just because we haven't gotten the rehire information just yet. But we will get that information and verify that you're eligible to enroll, so, um, from here-

Speaker speaker_2: Okay.

Speaker speaker_1: ... we'll take it from there.

Speaker speaker_2: Yeah. They're waiting on ***** getting a background check. That's all we're waiting on.

Speaker speaker_1: Okay. That makes sense.

Speaker speaker_2: Yes, ma'am. Yes, ma'am.

Speaker speaker_1: All righty. Perfect. Well, I will just go ahead and make notes that everything you're requesting is correct, and that's all I needed.

Speaker speaker_2: All right. You have a wonderful day, ma'am.

Speaker speaker_1: You too. Thank you. Bye.

Speaker speaker_2: Thank you. Bye.