

## Transcript: Chris Sofield

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### Full Transcript

Your call may be monitored or recorded for quality assurance purposes. Thank you for calling Benefits and a Card. This is Chris. How can I help you today? Yeah, I need to, um, make changes to my... uh, benefits. Okay. What staffing company do you work with? Um, American StaffCorps is... Okay. And then the last four of your Social? Um, 4142. And then your first and last name? Sandra Webster. All right, Ms. Webster, could you verify your address and your date of birth for me please? Um, sure. My date of birth's 3/12/1964 and our, uh, my address is 2507 Southwest Wolf Run Drive, Claremore, Oklahoma 74019. All right. Let's see here. We've got a phone number on file for you at 918-373-0932, is that correct? That is correct. Okay. All right. I'm showing it looks like we have enrollment to the VIP Excel Medical Policy along with Dental- Uh-huh. ... and FreeRx, all at employee and child level. Uh, what changes were you looking to make, ma'am? Um, to drop the child. He's... eligible- Okay. ... to get his own insurance- Okay. ... when he works on. So we're doing... So it'll just be me getting coverage now. Got it. So VIP Excel, FreeRx, and dental for employee only. That brings your total- Uh-huh. ... weekly deductions down to \$54.16. All right. I'll go ahead and- What was that, 64? Uh, 54. 5-4. 54. Okay. Yes, and 16th. 54... Okay. All right. And then, um, let's see here. Open enrollment is set up now but it's going, it's to go into effect as of January 6th. Uh, so c- um, you will still see, uh, the child- Right, yeah. ... on there at least until open enrollment goes into effect. Um, but about a week or so before January 6th is when you should see your deductions drop down to that 54.16 and then- Okay. ... you're good to go. Okay. And that takes- All right. Yeah. Okay. Yeah, he, he went full-time with ZUBCO from ASC, so he's eligible for his own insurance. Understood. All right then. Mm-hmm. Was there anything else I could help with? Um, let me, let me look at this. Hold on. Look up, yeah. On the... on the term life, can you tell me about that? Um... It says new for 2025, so that's why- Yes. Yes, so term life is a... well, term life insurance policy, uh, for employees up, um, you have a... it's a \$20,000 policy up to the age of 64. Uh-huh. After age 64, it does drop down to a \$15,000 policy. Uh-huh. Um, for... and that's for just yourself. That is \$2.11 per week. But then after 64, it drops to 15? Yes. So how- Uh-huh. Yeah, so it's a, it's a \$20,000 policy up in... up to the age of 64. Uh-huh. Um, after age 64, it drops to, uh, drops to a, to a, uh, \$15,000 policy. Uh-huh. Um, and then at age 70, it drops to a... it drops another 25%, uh, to a \$10,000 policy. Okay. Um... And you said it was \$2 and- Uh, \$2.11 per week. Per pay period, yeah. Um, can we go ahead and add that? Yes. Uh, that would bring your- Okay. ... deductions to 56.27 a week. Do you authorize- Okay. ... um, American StaffCorps to make those deductions? I do, yeah. All right. And then who are we naming as the beneficiary for the life insurance? Um, my husband, Kenny Webster. Kenny Webster, got it. All right. Can I put another person on there in case- Yeah. ... we just... um- Uh, yeah, you can... uh, did you want to have it split between Kenny and someone else or did you want Kenny as the primary and someone else as the

secondary? Kenny as the primary and then someone else as the secondary. Okay. Who would the secondary beneficiary be? Um, Tina Temple. Temple? All right, and her relationship to you? Uh, she's my daughter. Your daughter, got it. All right. Okay, we've got that set up for you. Uh, was there anything else? Uh, nope, I think that'll do it. All right. Well, if that is everything, thanks again for calling and have a wonderful day. All right, you too. Thank you so much. You're welcome. Bye now. Uh-huh. Buh-bye.

## Conversation Format

Speaker speaker\_0: Your call may be monitored or recorded for quality assurance purposes.

Speaker speaker\_1: Thank you for calling Benefits and a Card. This is Chris. How can I help you today?

Speaker speaker\_2: Yeah, I need to, um, make changes to my... uh, benefits.

Speaker speaker\_1: Okay. What staffing company do you work with?

Speaker speaker\_2: Um, American StaffCorps is...

Speaker speaker\_1: Okay. And then the last four of your Social?

Speaker speaker\_2: Um, 4142.

Speaker speaker\_1: And then your first and last name?

Speaker speaker\_2: Sandra Webster.

Speaker speaker\_1: All right, Ms. Webster, could you verify your address and your date of birth for me please?

Speaker speaker\_2: Um, sure. My date of birth's 3/12/1964 and our, uh, my address is 2507 Southwest Wolf Run Drive, Claremore, Oklahoma 74019.

Speaker speaker\_1: All right. Let's see here. We've got a phone number on file for you at 918-373-0932, is that correct?

Speaker speaker\_2: That is correct.

Speaker speaker\_1: Okay. All right. I'm showing it looks like we have enrollment to the VIP Excel Medical Policy along with Dental-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: ... and FreeRx, all at employee and child level. Uh, what changes were you looking to make, ma'am?

Speaker speaker\_2: Um, to drop the child. He's... eligible-

Speaker speaker\_1: Okay.

Speaker speaker\_2: ... to get his own insurance-

Speaker speaker\_1: Okay.

Speaker speaker\_2: ...

Speaker speaker\_3: ... when he works on.

Speaker speaker\_1: So we're doing...

Speaker speaker\_2: So it'll just be me getting coverage now.

Speaker speaker\_1: Got it. So VIP Excel, FreeRx, and dental for employee only. That brings your total-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: ... weekly deductions down to \$54.16.

Speaker speaker\_2: All right.

Speaker speaker\_1: I'll go ahead and-

Speaker speaker\_2: What was that, 64?

Speaker speaker\_1: Uh, 54. 5-4.

Speaker speaker\_2: 54. Okay.

Speaker speaker\_1: Yes, and 16th.

Speaker speaker\_2: 54... Okay.

Speaker speaker\_1: All right. And then, um, let's see here. Open enrollment is set up now but it's going, it's to go into effect as of January 6th. Uh, so c- um, you will still see, uh, the child-

Speaker speaker\_2: Right, yeah.

Speaker speaker\_1: ... on there at least until open enrollment goes into effect. Um, but about a week or so before January 6th is when you should see your deductions drop down to that 54.16 and then-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... you're good to go.

Speaker speaker\_2: Okay. And that takes-

Speaker speaker\_1: All right.

Speaker speaker\_2: Yeah. Okay. Yeah, he, he went full-time with ZUBCO from ASC, so he's eligible for his own insurance.

Speaker speaker\_1: Understood. All right then.

Speaker speaker\_2: Mm-hmm.

Speaker speaker\_1: Was there anything else I could help with?

Speaker speaker\_2: Um, let me, let me look at this. Hold on. Look up, yeah. On the... on the term life, can you tell me about that?

Speaker speaker\_1: Um...

Speaker speaker\_2: It says new for 2025, so that's why-

Speaker speaker\_1: Yes. Yes, so term life is a... well, term life insurance policy, uh, for employees up, um, you have a... it's a \$20,000 policy up to the age of 64.

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: After age 64, it does drop down to a \$15,000 policy.

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: Um, for... and that's for just yourself. That is \$2.11 per week.

Speaker speaker\_2: But then after 64, it drops to 15?

Speaker speaker\_1: Yes. So how-

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: Yeah, so it's a, it's a \$20,000 policy up in... up to the age of 64.

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: Um, after age 64, it drops to, uh, drops to a, to a, uh, \$15,000 policy.

Speaker speaker\_2: Uh-huh.

Speaker speaker\_1: Um, and then at age 70, it drops to a... it drops another 25%, uh, to a \$10,000 policy.

Speaker speaker\_2: Okay. Um... And you said it was \$2 and-

Speaker speaker\_1: Uh, \$2.11 per week.

Speaker speaker\_2: Per pay period, yeah. Um, can we go ahead and add that?

Speaker speaker\_1: Yes. Uh, that would bring your-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... deductions to 56.27 a week. Do you authorize-

Speaker speaker\_2: Okay.

Speaker speaker\_1: ... um, American StaffCorps to make those deductions?

Speaker speaker\_2: I do, yeah.

Speaker speaker\_1: All right. And then who are we naming as the beneficiary for the life insurance?

Speaker speaker\_2: Um, my husband, Kenny Webster.

Speaker speaker\_1: Kenny Webster, got it. All right.

Speaker speaker\_2: Can I put another person on there in case-

Speaker speaker\_1: Yeah.

Speaker speaker\_2: ... we just... um-

Speaker speaker\_1: Uh, yeah, you can... uh, did you want to have it split between Kenny and someone else or did you want Kenny as the primary and someone else as the secondary?

Speaker speaker\_2: Kenny as the primary and then someone else as the secondary.

Speaker speaker\_1: Okay. Who would the secondary beneficiary be?

Speaker speaker\_2: Um, Tina Temple.

Speaker speaker\_1: Temple? All right, and her relationship to you?

Speaker speaker\_2: Uh, she's my daughter.

Speaker speaker\_1: Your daughter, got it. All right. Okay, we've got that set up for you. Uh, was there anything else?

Speaker speaker\_2: Uh, nope, I think that'll do it.

Speaker speaker\_1: All right. Well, if that is everything, thanks again for calling and have a wonderful day.

Speaker speaker\_2: All right, you too. Thank you so much.

Speaker speaker\_1: You're welcome. Bye now.

Speaker speaker\_2: Uh-huh. Buh-bye.