

## Billing Changes & New Customer Website for SureBridge New Business

Effective Oct. 22, 2021 for the state of Wisconsin

### Billing Changes

#### What is changing?

- Policy coverage periods are now from the 1<sup>st</sup> of the month through the last day of the month.
- Billing will now be based on a first of the month premium due date.
- A policy's first billing cycle will happen on the issue date or effective date, whichever is later.
- On-going billing cycle dates are based on the policy effective date and are from the 2<sup>nd</sup> – 10<sup>th</sup> of the month (i.e., occurring after the new premium due date of the 1st).

#### What does this mean?

- Customers who do **not** have a 1<sup>st</sup> of the month effective date will have a one-time pro-rated\* premium debited from their bank account or credit card for their first premium payment to pay them to the end of the current month.
- Customers with a 1<sup>st</sup> of the month effective date will have a full month's premium debited from their bank account or credit card for the full coverage period and will not have a pro-rated billing.
- The billing cycle date will take place the 2nd – 10th of the month based on the effective date. See chart below for the schedule.

Effective Date	Billing/Charge Date
1st - 2nd	2 <sup>nd</sup>
3rd - 10th	3rd - 10th
11th - 13th	4 <sup>th</sup>
14th - 15th	5 <sup>th</sup>
16th - 18th	6 <sup>th</sup>
19th - 21st	7 <sup>th</sup>
22nd - 24th	8 <sup>th</sup>
25th - 27th	9 <sup>th</sup>
28th - 31st	10 <sup>th</sup>

\*The Point of Sale Tool will not calculate the pro-rated premium amount.

- Note: Customers may see "Key Bank" on their bank statement if their premium is charged to their bank account along with our company name which could be reflected as CHESAPEAKE/SUREBRIDGE, or CHESAPEAKE LIFE INSURANCE.

## New Customer website

- **Customers** will use the new Customer website at [mysurebridgeinsurance.com](https://mysurebridgeinsurance.com) where they can manage their plan, make payments, and other convenient features shown below.
- **Agents** cannot access this website to make requests, changes or cancel coverage on behalf of the customer. However, you can email the requested change or cancellation to [ProducerSupport@SureBridgeInsurance.com](mailto:ProducerSupport@SureBridgeInsurance.com) on behalf of the customer and it will be processed.



\*certain billing criteria must match for a plan's bill to be combined with another.

- These policies will not be serviced in the existing portal [Chesapeakeplus.com](https://Chesapeakeplus.com) or the Self-Service Tools for the customer or agent on behalf of the customer, as the customer's policy is supported on the new customer website [mysurebridgeinsurance.com](https://mysurebridgeinsurance.com). However, we are working on making the Self-Service Tool within the [Chesapeakeplus.com](https://Chesapeakeplus.com) website available to agents to make changes and requests early next year. Stay tuned for more information as this capability becomes available.