

## Report Request Form Template

### SECTION 1: Requestor Information

Requestors Name: \_\_\_\_\_

Date of Request: \_\_\_\_\_

Date Report Needed: \_\_\_\_\_

Account Name(s): \_\_\_\_\_

### SECTION 2: Report Requests

#### Member Benefit Report

1. Date Range:  Last Full Year  Year over Year  Year to Date
2. Dues Included (Y/N):  Yes  No
3. Preferred Format:  Word  PDF  Other: \_\_\_\_\_

#### Committee and Study Group Engagements Report

1. Committee/ Study Group Type:  LIMRA  LOMA  LIMRA & LOMA
2. Committee/Study Group Description:  Yes  No
3. Preferred Format:  Word  PDF  Other: \_\_\_\_\_

#### Executive Engagement Snapshot

1. Date Range:  Last Full Year  Year over Year  Year to Date
2. Member Segment:  All  Segment 1  Segment 2  Segment 3  Segment 4
3. Peer Groups:  All  Other: \_\_\_\_\_  
\_\_\_\_\_
4. Member Engagement Opportunities Page: (Y/N):  Yes  No

### SECTION 3: Additional Information

1. Special Instructions or Notes: \_\_\_\_\_  
\_\_\_\_\_

All requests must include this Report Request Form and should be forwarded to Renae Walker and Nancy Moquin *at least* 48hrs in advance of the date the report(s) is/are needed. Your primary support person will complete the request on your behalf. If they are out of the office, then their backup person will handle your request.

**Note:** Depending on the report requests & workload, reports might be provided prior to the 48hrs. Report requests could take 48 hours or longer in situations where a support staff member is out of the office or handling other projects, as well as based upon the complexity of the report. If additional time is required for more in-depth reporting, a support staff person will reach out to discuss your specific situation.

**Acknowledgment:** By submitting this form, I acknowledge and understand the processing timeline provided above.