

## NEW BUSINESS CHECKLIST - BROKER

- Application for Group Insurance Kit, or Participation Agreement – Completed in its entirety and signed before the requested effective date. Go to our website [www.dearbornnational.com](http://www.dearbornnational.com) for forms.
- Producer Transmittal - *Required*
- EAP Account Notice Form – *Required for EAP UPGRADE PROGRAMS*
- Deposit Premium Check – *Required*
- Electronic Census - Preferred for all groups. *Required for groups over 100 lives. Template with required fields is attached. NOTE: Required for Dental groups with 50+ lives.*
- Enrollment Forms – *Required for non-census groups under 100 lives. Also Required for all groups when evidence of insurability is required.*
- Employee Evidence of Insurability Forms – *Required if applicable*
- Copy of FINAL Sold Case Proposal - *Entire proposal required* for all sold coverages.
- Copy of Prior Carrier's Plan Policy / Certificate – *Required for ALL LTD, Voluntary STD and Dental*
- Prior Proof of Coverage – *Required for ALL Dental and Voluntary Life for grandfathered benefit amounts (prior carrier bill)*
- Additional Material for Special Programs –
  - Matching/ Takeover Voluntary Life - ALL REQUIRED**
  - a. Takeover Proposal**
  - b. Proof of 2 Year coverage with current carrier (current policy/cert)**
  - c. Proof of Current Rates & Recent Bill**
  - d. Current Census indicating grandfathered individuals and benefit amounts**

**NOTE: In order to provide our CUSTOMERS with timely and accurate issuance of documents, all information submitted to Dearborn National must be completed in order to proceed with the underwriting and issue process. Incomplete enrollment paperwork will result in processing delays.**

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