

# NEW GROUP CHECKLIST

*Use this New Group Checklist as a guide when submitting a new group with Benefits by Design (BBD)*

**Name of Group:** \_\_\_\_\_

## **GROUP MASTER APPLICATION**

A [Group Master Application](#) completed and signed by the Advisor, Policyholder, and Witness.

## **THE FINAL PLAN DESIGN**

The final plan design, including a proposal outlining the sold plan design.

## **ANY APPLICABLE ADDENDUMS**

Any applicable addendums, including the [ClaimSecure Addendum](#), [Cost Plus Addendum](#), [Green Shield Canada \(GSC\) Addendum](#), or [Standalone Addendum](#).

## **A VOID CHEQUE**

A void cheque for preauthorized payment.

*Booklets and ID cards will not be issued until the void cheque has been received and payment has been processed.*

## **GROUP INSURANCE EMPLOYEE ENROLLMENT**

All [Group Insurance Employee Enrollment Forms](#) completed by each eligible employee.

**Are any Employee Enrollment Forms still outstanding?**      **Yes**      **No**

## **PRIOR PLAN DESIGN**

To ensure continuation of coverage, please do not cancel coverage until BBD can confirm that we are able to approve coverage as requested. When submitting a sale for takeover business, please include:

### **DEDUCTIBLE LISTING**

Deductible Listing (if the group has a deductible on the plan) listing all employees who have satisfied the deductible for the current year.

### **CURRENT BILLING STATEMENT**

Current Billing Statement, showing individual employee's names and coverage amounts.

### **EHC POLICY PROTECTION PLAN STATEMENT**

Most recent Extended Health Care (EHC) Policy Protection Plan (EP3) Statement.

### **PRIOR PLAN DESIGN**

Prior Plan Design, showing the benefit schedule and pre-existing condition clause, for continuity of coverage.

## **COMMISSIONS**

Please confirm applicable payee(s) for this sale and whether commission should be paid per month or annualized\* for the first year.

If you're a new Advisor to BBD, you'll need to complete the Associate's Agreement in order to get set up as a partner of ours and begin receiving commissions.

*\*Annualized commissions require a minimum of three sales with BBD and are subject to an annualization factor.*