

## Broker Sold Case Checklist



### ***Submission Guidelines***

Minimum 3 employees and minimum \$4,500 in total annual HCSA funding.

Eligible Employees must work a minimum of 24 hours per week.

Complete applications received at The Benefits Trust on or before the 15<sup>th</sup> of the month will take effect the first of the following month

**NOTE:** Incomplete applications will not be processed until all materials are received at The Benefits Trust.

The following materials are enclosed (√) with this submission:

- Premium Calculation Worksheet and Premium Deposit for \$ \_\_\_\_\_
- Group Benefits Master Application
- Employee Enrollment Forms for eligible employees. Number enclosed: \_\_\_\_\_
- Participation Agreement
- Pre-Authorized Debit Form

Broker Name: \_\_\_\_\_

Advocis Member #: \_\_\_\_\_

Date: \_\_\_\_\_