

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 15th 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: _____