

CCAA/BALTIMORE LIFE New Group Information Checklist

PLEASE MAKE SURE YOU HAVE THE FOLLOWING COMPLETED BEFORE SUBMITTING YOUR CASE.

1. PARTICIPATION AGREEMENT: MUST BE COMPLETED, WITH EMPLOYER SIGNATURE AND DATE.
2. EMPLOYEE ENROLLMENT APPLICATION REQUIREMENTS: VERY IMPORTANT!
 - a. THE EMPLOYER IS ALWAYS CCAA AND THE HIRE DATE IS ALWAYS 1-MONTH PRIOR TO THE APPLICATION DATE. (EXAMPLE: IF APPLICATION DATE IS FEBRUARY 15TH, THE HIRE DATE WOULD BE JANUARY 15, 2002.)
 - b. PART A MUST BE COMPLETED IN INK FOR ALL CASES. EMPLOYEE SIGNATURE AND DATE IS REQUIRED ON THE BACK OF THE APPLICATION. (PART B IS ONLY REQUIRED FOR CRITICAL ILLNESS COVERAGE OR AN ENROLLED AMOUNT (S) THAT EXCEEDS THE G.I. LIMIT)
3. TRANSMITTAL SHEET: MUST BE COMPLETED BY THE AGENT. ALL EMPLOYER INFORMATION IS REQUIRED FOR ADMINISTRATION PURPOSES AND IS NECESSARY TO PROCESS THE CASE. AGENT INFORMATION IN THE BOX AT THE BOTTOM OF THE PAGE IS REQUIRED FOR COMMISSION PURPOSES.
4. VERIFICATION OF INCOME: MUST BE SUBMITTED FOR ALL DISABILITY CASES AND LIFE CASES OF MORE THAN \$100,000. ONE OR MORE OF THE FOLLOWING DOCUMENTS MAY BE USED FOR THIS PURPOSE. QUARTERLY WAGE AND TAX STATEMENT, FEDERAL SCHEDULE C OR S, W-2 FORMS, 1099 FORM, OR FEDERAL FORM 1120.
5. MONTHLY BANK DRAFT AUTHORIZATION: MUST BE COMPLETED, WITH EMPLOYER SIGNATURE AND DATE.
6. EMPLOYER PREMIUM CHECK: A CHECK FOR THE 1ST MONTH'S PREMIUM INCLUDING THE \$2.00 PER EMPLOYEE MONTHLY ADMINISTRATION FEE IS REQUIRED. CHECKS SHOULD BE MADE PAYABLE TO FINANCIAL RESOURCE GROUP (OR FRG) VOLUNTARY.

❖ *For the 1st of the month effective date complete enrollment must be submitted to our office prior to the 20th of the month.*

PLEASE MAIL ALL COMPLETED PAPERWORK TO:

Financial Resource Group
P.O. BOX 531178
Birmingham, AL 35253
1-800-543-3153
FAX: 205-802-7912

Thank you!