

Checklist For Submitting New Business

Group Life, AD&D, Dependent Life, Supplemental Life, Short Term and Long Term Disability

- Trust Participation Agreement (2 – 9 Ees) or
- Broker Program (Flat Rate) (2-9 Ees) or
- Application for Group Coverage (10 or more Ees)
- Copy of Proposal
- Enrollment Card for each eligible employee. For self-administered cases, a list of enrolled employees including name, gender, SS#, DOB, DOH, salary, class and occupation is acceptable.
- Evidence of insurability form, if evidence is required
- List of employees not actively at work, reason, expected date of return and insurance volume
- Binder check for first month's projected premium made payable to NCIA
- Copy of prior carrier's booklet for LTD cases
- W-2 agreement — for all groups with disability coverage
- If using the Discount Rating Strategy, provide a copy of the prior carrier's booklet and renewal letter and recent bill
- Bargaining agreement, if benefits are provided under such an agreement

Voluntary Dental

- Application for Group Coverage
- Enrollment Card for each eligible employee (all sections completed)
- Binder check for first month's projected premium made payable to: Fort Dearborn Life Insurance Company
- Copy of proposal
- Zip code of each employer location
- Copy of prior carrier's booklet (if applicable)

Voluntary Life, AD&D, Short and Long Term Disability

- Employer Application for Voluntary Benefits
- Enrollment Form for Voluntary Benefits for each eligible employee
- Evidence of Insurability forms, if applicable
- Copy of prior carrier's booklet for VSTD or VLTD

NOTE: All new business must be submitted prior to the effective date.

NOTE: Contact NCIA for appointment paperwork when submitting first case.

Administrative Office:
NCIA
840 First Street, NE
Washington, DC 20065

NOTE: Dental case submissions must be received by the 20th of the month prior to the proposed effective date.

Groups with 2 -49 employees submit new case paperwork to:

Bobby Moore
NCIA
840 1st Street, NE
Washington, DC 20065

Groups w/50 or more employees submit proposals/new business paperwork to:

Danielle Leclerc
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