**MORGAN WHITE GROUP**

**PREMIUM SAVER SOLD CASE CHECKLIST**

**Sold Group Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Effective date:\_\_\_\_/\_\_\_\_\_\_/20\_\_\_**

**Premium Saver sold case submission checklist:**

1. **Completed and signed group application**
2. **Check for 1st months premium- attach a copy if available and mail check to address below.**
3. **Copy of sold Premium Saver proposal**
4. **Excel template completed with groups enrollment**

**Primary SSN for dependents is the employees SSN so we can match dependents back to employee. Please send the file, not a print out of the file. PLEASE DO NOT DELETE ANY COLUMNS OR CELLS FROM THIS TEMPLATE.**

1. Complete the Group Bank Draft Form
2. California Groups must complete this portion

Please notate if group is subject to:

Federal COBRA

\_\_\_\_\_\_ # currently on Federal COBRA

California State Continuation

\_\_\_\_\_# currently on CA Continuation

\_\_\_\_\_\_\_Number of Full Time Employees

1. Prior Plan Deductible Credit

**Sold cases should be scanned and emailed to** [**mturley@ancillaryis.com**](mailto:mturley@ancillaryis.com)**. Attach a copy of the check and include it with the enrollment. Mail the check and this form (with section 6 completed) to**

**Morgan White Group**

**Marketing New Business**

**Attn:  Annie Davis**

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**Jackson, MS  39236**