

RELIANCE STANDARD

LIFE INSURANCE COMPANY

SmartChoice (2-19 lives)

PLEASE NOTE: This checklist is provided as a guide. The carrier may require additional items and documentation. Please refer to the carrier's underwriting guidelines for a complete list of requirements. Please use the latest version of forms.

Our goal is to process your new group enrollment easily and efficiently in order to provide you and your client with a quick approval. The following list outlines the health plan's case submission requests:

Request for participation and enrollment form for Life, LTD, STD & Dental*

Submission requirements

- ☐ Completed SmartChoice Request for Participation & Enrollment Form
- ☐ Initial deposit check equal to monthly premium amount
- ☐ Copy of sold proposal premium summary page(s) as presented to the employer

*To write a (2) employee dental group, two additional lines of coverage must also be sold.

If applicable:

- ☐ Prior carrier information required for Dental, STD and LTD coverage takeover
- ☐ Notification of Waiver Form(s)
- ☐ Evidence of Insurability Applications for Life benefits exceeding Non-Medical Issue Limits
- ☐ Quarterly State Wage Reports may be requested at the discretion of Reliance Standard

If any of the above items are missing or incomplete, processing of case may be delayed.

After approval, prior carrier termination letter must be submitted by the employer or broker.