

**FOR VISION, LIFE, STD AND LTD GROUPS OF 10+**

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:

- ☐ Employer Application
- ☐ Employee Enrollment/Waiver
- ☐ Health Statement - required for all employees electing over the Voluntary Term Life guarantee issue amount of \$50,000
- ☐ Prior Carrier Bill
- ☐ Prior Carrier Benefit Booklet
- ☐ Company check made payable to Principal Life Insurance Co. (not required by Principal Life Insurance Co.).
- ☐ eService Election Form for groups wishing paperless administration
- ☐ Broker: Must be licensed with Principal Life. If not licensed, licensing paperwork must be submitted with the case

For Life, STD and LTD:

- ☐ Risk appraisal questionnaire (Employer)
- ☐ LTD reporting agreement (optional)
- ☐ STD reporting agreement (optional)

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