

NEW CASE SUBMISSION CHECKLIST



All of the following must be received by Employers Group Trust before a case can be processed:

- Group Application/Participation Agreement.
- Deposit check payable to **The Lincoln National Life Insurance Company** equal to one month's premium.
- Completed enrollment form. Census enrollment is available only for those groups not requiring Evidence of Insurability.
- Evidence of Insurability Applications (if applicable). Please call The Managing Agency Group, Inc. to request evidence application(s).
- Commission Agreement with Social Security number and /or Federal I.D. number.
If commissions are split; each recipient must complete a Commission Agreement. This one-time agreement will be kept on file and will apply to all your EGT cases submitted.
- For replacement coverage, EGT requires a copy of the certificate booklet outlining coverages and the most recent bill listing employees covered. Proof of prior coverage is the responsibility of the Employer (Group) subject to underwriting guidelines.

All case materials must be received prior to the requested effective date.

MAIL SOLD CASE MATERIALS TO:

**Employers Group Trust
Attn: New Business Department
One Enterprise Drive, Suite 210
Shelton, CT 06484**

Additional EGT Contact Information

- **Sales Support x 1**
- **Policyholder Services x 3**
- **Premium Billing x 2**
- **Commissions and Licensing x 38**

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