

Guardian Enrollment Checklist



Guardian completes installation of new groups via digital onboarding. Once the Employer documentation is completed and submitted, the broker and group will receive an email on behalf of Guardian to digitally sign the Employer documents.

Broker Requirements

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| <input type="checkbox"/> Requirements | <ul style="list-style-type: none">• Complete and submit the Employer Release Letter if another broker has inforce Guardian products with this employer group.• Submit the quote from Guardian identifying the sold plan design and rates. |
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Employer Requirements

Please submit as soon as possible as these documents enable Guardian to build the group in preparation for enrollment.

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| <input type="checkbox"/> Master Application | <ul style="list-style-type: none">• This form is required for all new business and must be completed in its entirety.• This form does not need to be signed, it will be included in the Digital Signature Packet. |
| <input type="checkbox"/> Additional Information Questionnaire (AIQ) | <ul style="list-style-type: none">• This form is required for all new business and must be completed in its entirety. |
| <input type="checkbox"/> Banking Authorization for Direct Withdraw (optional) | <ul style="list-style-type: none">• Complete and submit if the employer wishes to have monthly premium payments withdrawn from a business account. |
| <input type="checkbox"/> Guardian Anytime Pre-registration Form | <ul style="list-style-type: none">• This form is required for all new business and must be completed in its entirety. |
| <input type="checkbox"/> Current Bill and Plan Summary | <ul style="list-style-type: none">• Provide a copy of the current billing statement.• A copy of the current plan summary or a benefit booklet may be required. |
| <input type="checkbox"/> Submission Deadline | <ul style="list-style-type: none">• 1st of month: 7 or more business days prior to the requested effective date is preferred.• 15th of month (PPO only): 7 or more business days prior to the requested effective date is preferred. |
| <input type="checkbox"/> NOTE | <ul style="list-style-type: none">• A DE-9C is not required.• A deposit check is not required. |

Employee Requirements

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| <input type="checkbox"/> Employee Application | <ul style="list-style-type: none">• Complete either the Employee Enrollment Census spreadsheet OR an Employee Enrollment Form for each employee.• Declining coverage: A Declination Form is not required for employees declining coverage. |
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| <input type="checkbox"/> Evidence of Insurability and Actively at Work Forms | <ul style="list-style-type: none">• These forms may be required for Life and Disability enrollments. |
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