

Agent and Broker New Group Submission Requirements

Prior to placing new business with Southland National, you must be licensed, contracted and appointed in the state of the account for which you are writing business. If you are currently appointed with Southland National and are submitting a group, please take the following steps:

_____ **Step 1**

Complete the Group Dental Master Application and the Group VisionChoice Master Application when applicable. All information on both forms must be completed and the forms signed by you and the client.

_____ **Step 2**

Verify if any former employees are currently on COBRA. If so, have all employees on COBRA complete the Southland National COBRA Enrollment Form.

_____ **Step 3**

Have **all** employees complete an Enrollment/Change Application. If an employee declines to take coverage or is covered by another plan, the employee should still complete a form but only indicate his/her name at the top and make a notation at the bottom of the form stating the reason for not taking the coverage. This information will be used to ensure participation requirements are met.

_____ **Step 4**

Obtain a check for the group's first month's premium made payable to Southland National Insurance Corporation.

_____ **Step 5**

Complete the Group Benefits Transmittal in its entirety. All information must be completed to ensure proper group and benefits set-up.

_____ **Step 6**

Submit a copy of the most recent detailed billing statement listing individuals currently covered under the plan. This information is required for a takeover group where waiting periods exist.

_____ **Step 7**

Attach to the Group Benefits Transmittal and a copy of the original group proposal issued by Southland's underwriting department that was approved by the client.

_____ **Step 8**

Submit the entire package to Southland National at the following address:

Southland National Insurance Corporation
Attn: Joanna S. Jungen
P.O. Box 1250
Tuscaloosa, AL 35403-1250

If you have questions regarding any of these documents, please contact Joanna S. Jungen @ 1-866-839-5308 or jjungen@southlandbenefit.com.

