



PROFESSIONAL GROUP PLANS, INC.
Specializing in Employee Benefits

**Sun Life NY LTD
25+ Lives
New Business Submission
Checklist**

- Group Application**
- Policy Holder Information Form**
- Final Census OR Enrollment Forms**
- W-2 Reporting Service Agreement**
- Copy of Sold Proposal**
- Prior Carrier Booklet (if applicable)**
- First Month's Premium Check Payable to:
Sun Life**
- Forms Must Be Submitted to PGP**
*prior to the effective date

If you have any questions, please contact your PGP representative.