



PROFESSIONAL GROUP PLANS, INC.
Specializing in Employee Benefits

**Sun Life Non NY/NJ Life
25+ Lives
New Business Submission
Checklist**

- Group Application**
- Policy Holder Information Form**
- Final Census OR Enrollment forms**
- Group Life Insurance Transition Form
(For Life Coverage Only)**
- Copy of Sold Proposal**
- Prior Carrier Booklet (if applicable)**
- First Month's Premium Check Payable to:
Sun Life**
- Forms Must Be Submitted to PGP**
*days prior to the effective date

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