



**PROFESSIONAL GROUP PLANS, INC.**  
*Specializing in Employee Benefits*

**Sun Life NY 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.**