



## **Vigilant Group Benefits Trust (VGBT)**

### **New Business / Renewal Checklist**

Thank you for your continued partnership with Vigilant Group Benefits Trust (VGBT). We have put together a New Business / Renewal Checklist with all of the paperwork required for us to process your group. Please include the following documents with your new business or renewing group submissions:

#### **New Business Mandatory Forms:**

- Group Master Application
- Employee Applications or census enrollment spreadsheet
- Binder Check for first month's premium
  - Please make check payable to: Vigilant Services - TPA
- Copy of the quote that was sold
- Vigilant membership application
  - No Check Required - Vigilant will invoice the group once the application is received

#### **Optional Forms (Required if applicable to the group):**

- Waiver Forms
- Deductible Credit Form

#### **Renewal Mandatory Forms:**

- Group Master Application
  - For groups making changes with multiple plan selections, we require an employee roster indicating the plan choice (submitted with the renewal Master Application)
- Employee Applications for new employees or dependent changes at open enrollment

**Please submit all new business or renewing group paperwork in a complete packet to DiMartino Associates by the 20<sup>th</sup> of the month prior to the effective date:**

**New Business Email:** [VGBT@dimarinc.com](mailto:VGBT@dimarinc.com)      **Renewals Email:** [VGBTrenewals@dimarinc.com](mailto:VGBTrenewals@dimarinc.com)

**General Inquires:** [VGBT@dimarinc.com](mailto:VGBT@dimarinc.com) or call (206) 623-2430