



aetna.com

Small Group Up to 50* New Business Checklist

Aetna Funding AdvantageSM

1. Submit sales notice form to afasalescoordinator@aetna.com and your sales rep

We will begin our review process once we receive all items listed below:

2. Email the following to our sales coordinator team (afasalescoordinator@aetna.com)

- ☐ **Springboard Marketplace census template**
 - Fully completed Defined Contribution/Census template
- ☐ **Signed proposal**
 - Employer must circle, sign and date the selected plans
- ☐ **AHIA Data Software License Agreement**
 - A copy is needed for each agency the group authorizes on the employer application (if applicable)
- ☐ **Prior Carrier Bill**
 - Bill must be the latest available with employer roster and premium summary page
- ☐ **Quarterly Wage & Tax Statement** (groups with 2 to 4 eligible employees only*)
 - Must provide complete, unaltered Quarterly Wage & Tax Statement and most current ownership tax documents (i.e. Schedule K-1, Schedule C, etc.) if owner/officer/partner not listed on Quarterly Wage & Tax Statement

3. Complete the following through Adobe Sign:

- ☐ **Employer application**
- ☐ **Stop loss application**
- ☐ **NY HCRA form**
- ☐ **Banking form**

*2-50 in GA, PA and TX. 2-100 in N.IL. 5-100 in CO, CT, MA and OH. 10-50 in NV. 26-50 in NC.

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