

## General Document to Qualify for Group Insurance

Number of Enrolling Employees	Sole Proprietor	Partnership/ Limited Partnership (LP)	Corporations	Limited Liability Company (LLC)
<b>Owners Only</b>	Business license or Fictitious Business Name Filing	Partnership Agreement or Business License or Fictitious Business Name Filing	Articles of Inc. or Statement of Information	Statement of Organization with Operating Agreement
	Owner Affidavit	Owner Affidavit	Owner Affidavit	Owner Affidavit
	Signed Enrollment Application or Refusal of Coverage	Signed Enrollment Application or Refusal of Coverage	Signed Enrollment Application or Refusal of Coverage	Signed Enrollment Application or Refusal of Coverage
	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock
	Recent Schedule C <sup>1</sup>	Recent Schedule K-1 <sup>1</sup>	Recent K-1 or other applicable tax filing document or W-2 <sup>1</sup>	Recent K-1 <sup>1</sup>
			Businesses established out of state require a Cert. of Qualification or Statement by Foreign Corporations	Businesses established out of state require a Foreign LLC Application for Registration

Number of Enrolling Employees	Sole Proprietor	Partnership/ Limited Partnership (LP)	Corporations	Limited Liability Company (LLC)
<b>2 to 5</b>	Business license or Fictitious Business Name Filing	Partnership Agreement or Business License or Fictitious Business Name Filing	Articles of Inc. or Statement of Information	Statement of Organization with Operating Agreement
	Owner Affidavit	Owner Affidavit	Owner Affidavit	Owner Affidavit
	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees
	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock
	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>
	If owners not listed on DE 9C: Recent Schedule C <sup>1</sup>	If owners not listed on DE 9C: Recent K-1 <sup>1</sup>	If Owners not listed on DE 9C: Recent K-1 or other applicable tax filing document or W-2 <sup>1</sup>	If owners not listed on DE 9C: Recent K-1 <sup>1</sup>
			Businesses established out of state require a Cert. of Qualification or Statement by Foreign Corporations	Businesses established out of state require a Foreign LLC Application for Registration

Number of Enrolling Employees	Sole Proprietor	Partnership/ Limited Partnership (LP)	Corporations	Limited Liability Company (LLC)
<b>6 to 24</b>	Business license or Fictitious Business Name Filing	Partnership Agreement or Business License or Fictitious Business Name Filing	Articles of Inc. or Statement of Information	Statement of Organization with Operating Agreement
	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees
	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock
	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>
	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit
			Businesses established out of state require a Cert. of Qualification or Statement by Foreign Corporations	Businesses established out of state require a Foreign LLC Application for Registration

Number of Enrolling Employees	Sole Proprietor	Partnership/ Limited Partnership (LP)	Corporations	Limited Liability Company (LLC)
<b>25+</b>	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees	Signed Enrollment Application or Refusal of Coverage for all eligible employees
	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock	Binder check on company check stock
	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>	DE 9C <sup>2</sup> or 6 weeks of payro11 <sup>3</sup>
	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit	If owners not listed on DE 9C: Owner Affidavit

1 Proof of income for owners is required, such as cancelled draw checks, if tax filings are not available due to length of time in business or a tax filing extension.

2 A copy of the most recent payroll register is required for new employees hired after the DE 9C filing.

3 Six weeks of payroll records are required for businesses that have been in business for at least six weeks prior to the requested effective date but not long enough to have a filed DE 9C. Payroll records must be for at least two eligible employees.

Note: Some underwriting departments may request additional documentation in situations where an affidavit was submitted but eligibility questions remain. Articles of Inc., Statement of Information, and Statement by Foreign Corporations, must be filed and stamped listing names of all officers/owners.