

## New customer application checklist

You're ready to realize the potential of Aetna Funding Advantage<sup>SM</sup> plans for small groups. We want to process your request as quickly as possible. You can help by submitting all the necessary paperwork listed below.

### Employer/company application

- Complete all sections of the application — any missing information will cause a delay in group implementation.
- Employer signature must be an owner or corporate officer.
- Broker must sign the Employer Application and Statement of Understanding. **Note:** Agent/broker must be licensed in your state and appointed by Aetna.

**Stop loss application** (form NB026 for groups with 50 employees or less or form NB510 for groups of 51 or more employees; applications vary by state within these forms)

### Claim fiduciary form (form NB503)

- Aetna carries the stop loss, so you must assign the fiduciary responsibility to Aetna.

### Subrogation affidavit (form NB505)

### Copy of current carrier bill

- Bill must be the latest available with employer roster and premium summary page.

### Copy of quote that was presented to group

- Sold quote needs to be signed and sold benefits marked.
- Provide current and last year's renewal to support qualification.

### Employee enrollment form and e-list census

- All sections must be completed for each employee.

### Set up banking account\*

- Fill out Banking Agreement provided to you by Aetna.
- Aetna will supply you with Citibank's ABA number (021000089) and your unique account number.
- Provide this information to your local bank with written authorization to honor Aetna's federal wire draw-downs from your account. It is important that you complete this step with your bank and fill out the proper paperwork to authorize a federal wire draw-down (not an ACH).
- You will be notified by your local bank when everything is set up and the first draw-down can occur.

**Note:** Your bank must be a member of the Federal Reserve and must provide Aetna with an ABA number that will accept federal wire draw-downs.

\*Each bank has its own procedure. Some banks may require additional information but this process is between the customer and their bank. In addition, some banks may charge a fee for initiating a federal wire draw-down.

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