New Case Submission Checklist:

[ ] MetLife Master Application (1 page. Signed by Employer and Agent)

[ ] MetLife New Group Submission Application (3 pages. Signed by Employer)

[ ] MetLife Statement of Responsibility (1 page. Signed by Employer)

[ ] Census Template (Dependents listed on Tab 2)

[ ] Enrollment Forms (If Applicable—usually only used for Voluntary products)

[ ] Copy of Sold Case Proposal (signed by agent)

NO BINDER CHECK IS NEEDED. Employer will be billed when case is implemented.

MetLife®

Metropolitan Life Insurance Company
200 Park Avenue, New York, New York

APPLICATION FOR GROUP INSURANCE

The applicant named below is applying for Group Insurance to provide coverage for the class(es) of persons specified below.

APPLICANT DATA

1. Full legal name of Applicant:_____(the "Policyholder")
2. Address:_____City_____ State_____ Zip_____

EFFECTIVE DATE

The effective date of the applied for group insurance will be _____, subject to MetLife's acceptance of this application and the applicant's payment of the Premium due on or before such date.

SITUS

Group Policy forms will be issued for delivery in and governed by the laws of _____.

COVERAGE DATA

Employees / Members	Dependents

PREMIUM DATA

Premiums will be paid: ☐ Monthly ☐ Quarterly ☐ Annually ☐ Other:_____

Attached is an advance payment of: $_____.

AGREEMENT

The Applicant signing below agrees to accept the terms and provisions of all Group Policy forms issued pursuant to this application; including all Exhibits, amendments and endorsements, if any.

Fraud Warning. Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

_____ _____
(Signature of Applicant's Authorized Representative) (Print Name and Title of Authorized Representative)

Signed at_____ Date:_____
(City) (State)

_____ _____
(Signature of Licensed MetLife Agent or Resident Agent as required by law) (Agent's State License No.) (Print Name of Agent)

GA New Group Submission Application

MetLife

CUSTOMER INFORMATION

Legal Name of Company: _____

Legal Address of Company (No PO Boxes): _____

Address Line 2: _____

City, State, Zip: _____

Employer Tax Identification Number (TIN): _____

SIC Code used to Rate Group: _____ Year Company Founded: _____

Effective Date: _____ **Broker Due Date: Next Business Day**

Number of eligible employees: _____

Coverage(s) sold: ☐ Basic Life ☐ PPO Dental ☐ Vision ☐ ER Sponsored Short Term Disability
☐ Supplemental Life ☐ DHMO ☐ Long Term Disability ☐ Voluntary Short Term Disability

Will MetLife be taking over voluntary elections from a prior carrier? If yes, a prior carrier's bill showing individual elections is required with submission. ☐ Yes ☐ No

Does this group have existing coverage with MetLife? If yes, please include the group #:

BROKER INFORMATION

Broker First and Last Name: _____

Social Security #: _____

Corporation Name: _____

Federal Tax ID: _____

Resident State: _____

Broker Address 1: _____

Broker Address 2: _____

Broker City, State, Zip: _____

Broker Contact Name: _____ Phone: _____ Email: _____

Is Broker Appointed with MetLife? ☐ Yes ☐ No If no or unsure, please contact your assigned Client Acquisition Associate

Commissions Paid to: ☐ Writing Producer ☐ Brokerage

GA/TPA Name : Aspire Benefits, LLC

GA/TPA Writing Producer First & Last Name: Hugh B. White

GA/TPA Local Sales Office Address: 6099 Riverside Dr., Suite 104 Dublin, Ohio 43017

GA/TPA Contact Name: Hugh B. White Email: HughBWhite@AspireBenefits.com

METLIFE SALES INFORMATION: TO BE COMPLETED BY METLIFE, INTERNAL USE ONLY

MetLife Sales Office: _____

MetLife Sales Rep: _____

MetLife Contact: _____

Metlife CAA Email: _____

PRIMARY CONTACT/BENEFIT ADMINISTRATOR INFORMATION — ☐ Same as Above

Contact First and Last Name: _____

Billing Address Line 1 *(if different than above)*: _____

Billing Address Address Line 2: _____

City, State, Zip: _____

Contact Email: _____

Contact Email/Phone/Fax: _____

Should this contact have access to: MetLink® ☐ Yes ☐ No

Do you wish for your GA/Broker to have MetLink access to your account? ☐ Yes ☐ No

CUSTOMER EXECUTIVE CONTACT INFORMATION

Contact First and Last Name: _____

Contact Email: _____

Contact Phone/Fax: _____

Should this contact have access to MetLink®: ☐ Yes ☐ No

**MetLink® – Our Online administration system designed to make benefits administration easier. MetLink provides convenient, real-time access to MetLife's systems – enabling you to efficiently add or modify employees employee information and look up dental or disability claim status. You can also view your current bill on-line, looking up billing history and run a listing of employees that can be reviewed on-line or downloaded into a spreadsheet.*

ELIGIBILITY INFORMATION

Class Description: **All Active Full Time Employees** Number of hours worked: **30 hours**

EMPLOYEE WAITING PERIODS

For Present Employees: _____ days/months ☐ Date Eligible ☐ First of the Month

For Future Employees: _____ days/months ☐ Date Eligible ☐ First of the Month

If you have additional classes or if class description or number of hours worked differs from above, please provide the eligibility information mentioned above for each class in the space provided below.

Domestic Partners: If your state does not require domestic partner and you would like it removed, please check here. ☐ Please Remove Domestic Partner

PREMIUM CONTRIBUTIONS

Employer Contribution Percentage — If the employer pays 100% of the premium, all eligible employees must participate.

EMPLOYERS CONTRIBUTION ON BEHALF OF:	BASIC LIFE / AD&D	SUPPLEMENTAL LIFE/ADD	DENTAL PPO	DENTAL DHMO	VISION	LTD	VOLUNTARY STD	ER SPONSORED STD
Employee	_____ %	_____ %	_____ %	_____ %	_____ %	_____ % ☐ Pre Tax ☐ Post Tax	_____ % ☐ Pre Tax ☐ Post Tax	_____ % ☐ Pre Tax ☐ Post Tax
Dependent	_____ %	_____ %	_____ %	_____ %	_____ %	n/a	n/a	n/a

EARNINGS DEFINITION

☐ Basic Earnings Only ☐ + Commissions ☐ + Bonus

Average over ☐ 12 Months ☐ 24 Months ☐ 36 Months

Section 125: Is your policy covered under Section 125? ☐ Yes ☐ No

ERISA INFORMATION

MetLife provides as a standard service for ERISA plans a document entitled "ERISA Information" that, together with your insurance certificate, can be used as your Summary Plan Description. This includes a grant of discretion to MetLife, as claims administrator. If you do not want MetLife to provide this "ERISA Information" please notify your broker so the appropriate modifications can be completed.

Special Case Notes (FOR METLIFE INTERNAL USE ONLY):

LIFE, SHORT TERM DISABILITY OR LONG TERM DISABILITY COVERAGES:

Are there any significant health risks within this customer? ☐ Yes ☐ No

If "Yes", please provide details (do not include individual names):

Employees Not Actively At Work – Please list any current employees **not actively working** (excluding employees on vacation) as of the effective date. These employees must be disclosed and **are not eligible** for coverage until they return to work.

Name: _____ Reason: _____

Name: _____ Reason: _____

Name: _____ Reason: _____

DISABILITY ONLY

☐ MetLife will issue W2's for LTD and STD ☐ Customer will issue W2's for LTD and STD

The employer will receive an Employer W2 report annually if MetLife issues the W2's.

Note: The benefits must be taxable or MetLife's system will not produce a W2

If you are using a payroll vendor, have you discussed with your Payroll Vendor who should be issuing W2s for taxable disability benefit payments (Third Party Sick Pay)? If you have not discussed this matter and obtained an agreement with your Payroll Vendor you may experience W2 and tax reporting issues at the end of the tax year.

Are there any individuals being covered that are FICA exempt or partially FICA exempt? ☐ Yes ☐ No

If you have both FICA exempt and non FICA exempt employees additional class structure may be required for your FICA exempt employees. Please identify all FICA exempt employees on your enrollment listing (census) and their exemption status (Social Security and/or Medicare)

Please check all that apply: ☐ Social Security Exempt ☐ Medicare Exempt ☐ Social Security & Medicare Exempt

Please explain why your employees are exempt from FICA (Social Security and/or Medicare):

☐ Municipality ☐ Schools ☐ Religious Organization ☐ Other: _____

Do the FICA exemptions described above apply to all covered employees? ☐ Yes ☐ No

AUTHORIZATIONS

MetLife will deliver the group insurance policy and certificates to the company via e-mail as Adobe pdf documents and confirms that it is able to save them as electronic records and print them (if requested) for distribution to individuals who become covered under the group insurance policy.

HIPAA Information (Dental Only):

☐ I am an authorized representative of the MetLife customer named above. By checking this box, I understand and confirm that no access will be given to employee's Protected Health Information (PHI).

This section is to be completed by the individual authorized by the company to sign the Application for Group Insurance in order to confirm that the company has requested or undertaken with respect to the implementation of MetLife insurance and/or service program(s). Please read carefully and complete by checking all boxes that apply.

☐ By checking this box and signing below, I certify that I received a copy of the Intermediary Compensation Notice (included below)

☐ By checking this box and signing below, I certify that the Gramm-Leach-Bliley Privacy Notice (included with their document) has been distributed to all affected employees.

Signature of Executive Contact or Benefit Administrator

Date

Group, Voluntary & Worksite Benefits
Metropolitan Life Insurance Company
200 Park Avenue
New York, NY 10166

MetLife

Statement of Responsibility

MetLife will be responsible to the group policyholder for the performance of its administrative obligations under the group policy, this agreement and any other written agreement between MetLife and the group policyholder. If MetLife uses a third party in connection with any of MetLife's administrative obligations, MetLife will remain responsible to the group policyholder for the performance by the third party of those administrative obligations. The third party will work under the control and direction of Metlife and Metlife will be solely responsible for the acts, errors and omissions of the third party.

The group policyholder will be responsible to MetLife for the performance of its administrative obligations under the group policy, this agreement and any other written agreement between MetLife and the group policyholder. If the group policyholder uses a third party in connection with any of the group policyholder's administrative obligations, the group policyholder will remain responsible to MetLife for the performance by the third party of those administrative obligations. The third party will work under the control and the direction of the group policyholder and the group policyholder will be solely responsible for the acts, errors and omissions of the third party.

To be completed by Policyholder:

Signed at:

(City) (State) Date (MM/DD/YYYY)

(Signature of Group Policyholder's Authorized Representative) (Print Name and Title of Authorized Representative)

To be completed by Metropolitan Life Insurance Company:

James W. Reid
Executive Vice President
Group, Voluntary & Worksite Benefits

Date (MM/DD/YYYY)