



GROUP VISION PLAN

Agent Case Submission Checklist

Company Name _____

___ Infinity Trust Vision Plan A ___ B ___ C ___

___ Completed Group Information Form

___ Completed Infinity Trust Employee Enrollment Forms for Each Enrollee / Waiver

___ State Employment Reporting Forms or Other Employer Evidence (Copy of Wage and Tax forms, Incorporation Papers etc.)

___ Copy of quote

___ Check for premium (monthly, quarterly, or semi-annual) made payable to Infinity Trust

___ Vision Plan Certificates Mailed to:

___ Mail to Client

___ Mail to Agent

___ Agent Requirements

Copy of agent's license, E & O coverage, completed Broker Commission Agreement (2 copies) and completed IRS Form W-9, if this is first Infinity Trust case submitted.

N.B.: Commission will not be paid until all agent requirements are received.