



GAPP I.

GAPP II.

TAPP.

# ENROLLMENT CHECKLIST

## Group Accident Protection Plan

Employer Name: \_\_\_\_\_

Employer Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Phone: (     ) \_\_\_\_\_

Email: \_\_\_\_\_

Primary Producer / Agent Name: \_\_\_\_\_ Commission %: \_\_\_\_\_

Address: \_\_\_\_\_ Tax ID# \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Co-Producer / Agent Name: \_\_\_\_\_ Commission %: \_\_\_\_\_

Address: \_\_\_\_\_ Tax ID# \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

General Agent's Name: \_\_\_\_\_ Commission %: \_\_\_\_\_

Address: \_\_\_\_\_ Tax ID# \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Effective Date: \_\_\_\_\_ Date Submitted: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

- Included Are:
- \_\_\_\_\_ Employer Application for Coverage
  - \_\_\_\_\_ Proposal
  - \_\_\_\_\_ Producer / Agent Licensing Madison National Life - Occupational Accident
  - \_\_\_\_\_ Producer / Agent Licensing Independence American - Employer Liability, if applicable
  - \_\_\_\_\_ Premium Check in the amount of \$ \_\_\_\_\_
  - \_\_\_\_\_ Owner Waiver, Contract Labor and Employee Census Form
  - \_\_\_\_\_ ERISA Plan Worksheet
  - \_\_\_\_\_ Agreement for Electronic Funds Transfer

**Please Note:** For electronic ACH premium payments, please submit one full month's premium with your application. This payment will be pro-rated to the first of the following month. An adjustment, if applicable, will be made on the next month's billing statement. ACH payments are drafted on the 5th of each month.

**Marketed By: George W. Evans & Associates, Inc.**

Send Completed Enrollment Material to: 5904 Dolores, Houston, TX 77057-5604

(800) 580-3826 or (713) 780-1116

Fax: (713) 782-1113

gapp@gwevans.com

**Administered by: North American Benefits Company (NABCO)**

20 Valley Stream Parkway, Suite 310, Malvern, PA 19355

(800) 994-GAPP (4277)



**GROUP ACCIDENT PROTECTION PLAN  
APPLICATION FOR COVERAGE – GAPP II**

**MADISON NATIONAL LIFE INSURANCE COMPANY, INC.**  
1241 John Q. Hammons Dr., Madison, WI 53717

1. Legal Name of Applicant: \_\_\_\_\_  
DBA: \_\_\_\_\_ Federal Tax ID Number: \_\_\_\_\_
2. Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_
3. Physical Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_
4. Mailing Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_
5. Email Address: \_\_\_\_\_ Business Phone: \_\_\_\_\_
6. Nature of Organization:  Corporation  LLC  Sole Proprietorship  Other (explain): \_\_\_\_\_
7. How long has the organization been in business? \_\_\_\_\_ What are the hours of operation? \_\_\_\_\_
8. Type of workers to be covered: W-2 Employees:  Yes  No 1099 Labor:  Yes  No
9. What date was the Worker's Compensation Act rejected? \_\_\_\_\_
10. Has insurance of this type (Occupational Accident and/ or Employer Liability) been canceled, refused or non-renewed by any company during the past three (3) years?  Yes  No If Yes, please provide details:  
\_\_\_\_\_

11. Does the Applicant manufacture, store, distribute, sell, handle or transport any of the following?
 

Chemicals	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____
Pharmaceuticals	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____
Fuel Oils	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____
Hazardous Materials	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____
Nuclear Materials	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____
Asbestos Materials	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Details: _____

12. Does the Applicant currently have an ERISA Plan they wish to continue?  Yes  No If Yes, please provide a copy of the complete plan document, including the Summary Plan Description. It must be approved in writing by the Company prior to use.
13. Are any affiliated entities to be covered?  Yes  No If Yes, please provide Legal Names and Addresses:  
\_\_\_\_\_  
\_\_\_\_\_

Please specify the number of employees at each location: \_\_\_\_\_  
\_\_\_\_\_

14. Are owners, officers or partners to be covered?  Yes  No If Yes, do they appear on the State Employment Commission Report?  Yes  No  
Please list the owners, officers or partners that are to be excluded from coverage: \_\_\_\_\_  
\_\_\_\_\_

15. Policy Elections:

- Deductible (per covered employee per occurrence):
  - Indicate amount (\$1,000 min/ \$50,000 max): \$ \_\_\_\_\_
- Combined Single Limit (per covered employee per occurrence):
  - Indicate amount (\$100,000 min/ \$2 mill max): \$ \_\_\_\_\_
- Aggregate Limit of Liability (per occurrence):
  - \$3 mill
- Accumulation Period (weeks):
  - 52  110  156
- Weekly Indemnity:
  - Elimination Period (days):  7 min  28 max  Other, please list: \_\_\_\_\_
  - Benefit Amount (% of weekly wage):  75%  Other, please list (50% min/ 90% max): \_\_\_\_\_%
  - Maximum Weekly Indemnity:  \$750  Other, please list (\$200 min/ \$800 max): \$ \_\_\_\_\_
  - Maximum Weeks Duration (weeks):  52  110  156
- Accidental Death, Dismemberment and Loss of Use:
  - \$150,000  Other, please list (\$100,000 min/ \$500,000 max): \$ \_\_\_\_\_
- Occupational Disease, Cumulative Trauma and Occupational Hernia (subject to policy limits):
  - Included
- Include Waiver of Subrogation:  Yes  No
- Include Alternate Employer Endorsement:  Yes  No

16. Premium Calculation and Payment Mode:  Monthly Bill

NCCI Code	Payroll	Payroll Rate	Total for Class
Total Payroll			
	Composite Rate		
		Premium Subtotal:	
		Monthly Admin Fee:	
		Annual Policy Fee:	
		<b>Initial Payment:</b>	

*(Please make premium check payable to NABCO)*

THE INFORMATION ABOVE ACCURATELY REPRESENTS: 1) THE GAPP II PLAN DESIGN FOR WHICH WE ARE APPLYING, AND 2) THE REQUIRED EMPLOYEE INFORMATION.

Employer Authorized Signature	Date
Broker or Agent Name (please print)	
Broker or Agent Signature	Date

**THE EMPLOYER CERTIFICATION (FORM # OCC ACC APP CERT 1016) OF THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE APPLICATION FOR THE COMPANY TO ISSUE A POLICY.**

**EMPLOYER CERTIFICATION  
TO GROUP ACCIDENT PROTECTION PLAN APPLICATION**

**THE COMPANY CANNOT ISSUE A POLICY UNLESS THIS CERTIFICATION IS  
COMPLETED AND SUBMITTED WITH THE APPLICATION**

We, the undersigned Employer, hereby certify the following:

1. We are applying to Madison National Life Insurance Company, Inc. (the Company) for Accident Insurance. We fully acknowledge and understand that acceptance of this request is subject to all of the Company's requirements and verification of quoted premium. The insurance applied for shall not be effective until the application has been approved and accepted by the Company in writing and the Coverage Effective Date has been assigned. A Policy and Schedule of Benefits will be issued.
2. We understand that 100% of all eligible employees must be covered and that this will be verified using quarterly employment tax statements.
3. In order for employee insurance to take effect, each employee must satisfy the eligibility requirements of the Policy.
4. We agree to pay the required premiums to the Company when due.
5. We have reviewed the sales material and the application. These materials, taken together, describe the coverage terms explained to us by the broker/agent whose signature appears below.
6. We understand the coverage terms, conditions, limitations, and exclusions of the Accident Insurance for which we are applying.
7. WE ACKNOWLEDGE AND FULLY UNDERSTAND EACH OF THE FOLLOWING ITEMS:
  - a. The coverage for which application being made is an employee benefit and does not insure any casualty or general liability risk of the Employer. This coverage is not intended to nor will it provide the Employer with any protection or defense against any suit which may be brought by an employee or anyone else.
  - b. Neither the Company nor the undersigned broker/agent has represented the coverage as anything other than an employee benefit which offers no indemnity for the Employers' liability.
  - c. THIS IS NOT A PROGRAM OF WORKERS' COMPENSATION INSURANCE. WE DO NOT BECOME A SUBSCRIBER TO THE WORKERS' COMPENSATION SYSTEM BY PURCHASING THIS COVERAGE. AND IF WE ARE A NONSUBSCRIBER, WE LOSE CERTAIN COMMON LAW DEFENSES TO SUIT AS WELL AS CERTAIN LIMITATIONS ON LIABILITY THAT WOULD OTHERWISE ACCRUE UNDER THE WORKERS' COMPENSATION LAWS. WE MUST COMPLY WITH THE WORKERS' COMPENSATION LAW AS IT PERTAINS TO NON-SUBSCRIBERS AND THE REQUIRED NOTIFICATIONS THAT MUST BE FILED AND POSTED.
8. I am authorized by the Employer to review and to sign this Certification.
9. Madison National Life Insurance Company, Inc. and its representative are authorized to contact me by mail or telephone to discuss this certification.

**THE COMPANY CANNOT ISSUE A POLICY UNLESS THIS SECTION OF THE APPLICATION IS COMPLETED.**

---

Employer Authorized Signature

Title

Date

---

Broker or Agent Signature

Printed Name of Agent

Date



# GAPP I. GAPP II. TAPP. GROUP ACCIDENT PROTECTION PLAN

Check One:  GAPP I  GAPP II  TAPP

## Owner/ Officer Waiver, Contract Labor and Employee Census Form

Employer Name: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

Are Officers, Owners and/ or Partners to be covered?:  Yes  No

If No, please list individuals to be excluded from coverage:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### Census

Employee Name	Social Security #	DOB	Date of Hire	Monthly Wages \$	NCCI Class	W2 <input type="checkbox"/>	1099 <input type="checkbox"/>
Job Titles/Duties		Termination Date					

Employee Name	Social Security #	DOB	Date of Hire	Monthly Wages \$	NCCI Class	W2 <input type="checkbox"/>	1099 <input type="checkbox"/>
Job Titles/Duties		Termination Date					

Employee Name	Social Security #	DOB	Date of Hire	Monthly Wages \$	NCCI Class	W2 <input type="checkbox"/>	1099 <input type="checkbox"/>
Job Titles/Duties		Termination Date					

Employee Name	Social Security #	DOB	Date of Hire	Monthly Wages \$	NCCI Class	W2 <input type="checkbox"/>	1099 <input type="checkbox"/>
Job Titles/Duties		Termination Date					

Employee Name	Social Security #	DOB	Date of Hire	Monthly Wages \$	NCCI Class	W2 <input type="checkbox"/>	1099 <input type="checkbox"/>
Job Titles/Duties		Termination Date					

If additional space is needed, please use the Employee Census Supplemental Form.

I certify \_\_\_\_\_ the above information is accurate and agree that wages are subject to verification and audit.  
 (Signature of Employer Representative)

Please complete this form when any new additions or terminations occur with your statement.

Return to: NABCO  
 Attn: GAPP  
 20 Valley Stream Parkway, Suite 310  
 Malvern, PA 19355

## Recurring Credit Card Payments

### Procedures

- Any policyholder who elects Recurring Credit Card payments is required to complete an Authorization Form (See attached).
- The policy will have a 1<sup>st</sup> of the month billing date.
  - If the effective date of the policy does not fall on the first of the month, the initial credit card payment will be pro-rated to the first of the month.
    - Example:
      - Effective date 1/15/17.
      - Initial credit card payment will be for the billing period of 1/15/17 through 2/28/17.
      - The next payment due date will be 3/1/17.
- The policyholder will receive the attached instructions with each subsequent invoice.
- The subsequent invoices will be mailed the 15<sup>th</sup> day of each month prior to the group's next 1<sup>st</sup> of the month due date.
- The policyholder will be instructed to complete their monthly invoices by reflecting any changes to the number of lives, payroll, and premium.
- The completed invoice must be emailed to Nabco by the 5<sup>th</sup> day of each month.
  - Example:
    - The 2/1 invoice will be mailed to the policyholder on 1/15.
    - The policyholder must update the number of lives, payroll, and premium due and email the completed invoice by 2/5 to Nabco.
    - Email Address: [gappptd@nabenefits.com](mailto:gappptd@nabenefits.com)

**The completed invoice will authorize Nabco to charge the updated premium due to the credit card maintained on file.**

- If the invoice is not received, Nabco will process the current monthly premium based on the prior months reported lives, payroll, and paid premium.
- NABCO will charge the credit card maintained on file on the 10th calendar day of each month for the premium due.
- A payment receipt will be emailed to the policyholder.
- If payment is rejected, Nabco will contact the policyholder for payment.
- If a replacement credit card is not available, a check payment will be required and the group will be removed from the automatic credit card billing.



NORTH AMERICAN BENEFITS COMPANY  
 20 Valley Stream Parkway, Suite 310  
 Malvern, PA 19355  
 800-994-4277

### Credit Card Recurring Payment Authorization Form For Occupational Accident Policy

Schedule your payments to be automatically charged to your credit card. Just complete and sign this form to get started!

**Recurring Payments Will Make Your Life Easier:**

- It's convenient (saving you time and postage)
- Your payment is always on time (even if you're out of town)

**Here's How Recurring Payments Work:**

- You authorize regularly scheduled charges to your Visa, MasterCard, American Express or Discover card.
- You will be charged each billing period for the total amount due for that period.
- You agree to email the completed billing statement to NABCO @ [gappptd@nabenefits.com](mailto:gappptd@nabenefits.com) by the 5<sup>th</sup> of each month. This billing statement notification will authorize NABCO to charge the premium amount due to your credit card.
- Once your payment is submitted, a receipt will be emailed to you and the charge will appear on your credit card statement.

**Please complete the information below:**

I \_\_\_\_\_ authorize North American  
 (Please Print Full Name & Title)

Benefits Company to charge the credit card indicated below on the **10th** calendar day of each month for payment of my assigned Occupational Accident Policy.

Policyholder Name \_\_\_\_\_ Policy # \_\_\_\_\_

Credit Card Billing Address \_\_\_\_\_ Phone# \_\_\_\_\_

City, State, Zip \_\_\_\_\_ Email \_\_\_\_\_

Account Type:  Visa  MasterCard  Amex  Discover

Cardholder Name \_\_\_\_\_

Account Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

CVV (3 digit number on back of Visa/MC, 4 digits on front of AMEX) \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

I authorize the above named business to charge the credit card indicated in this authorization form according to the terms outlined above. If the above noted payment dates fall on a weekend or holiday, I understand that the payments may be executed on the next following business day. I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify the business in writing of any changes in my account information or termination of this authorization at least 15 days prior to the next billing date. This payment authorization is for the type of bill indicated above. I certify that I am an authorized user of this credit card and that I will not dispute the scheduled payments with my credit card company provided the transactions correspond to the terms indicated in this authorization form.

*North American Benefits Company  
20 Valley Stream Parkway  
Suite 310  
Malvern, PA 19355  
1-800-994-4277*

***TO OUR OCCUPATIONAL ACCIDENT PROTECTION PLAN POLICYHOLDERS***

***RECURRING CREDIT CARD INSTRUCTIONS***

- *Enclosed please find your modal billing statement for your current Occupational Accident Policy.*
- *Please return the completed billing statement along with a completed Report of Change or Contract Labor Census (if it pertains to your policy) to ensure that we have the most accurate data.*
- *Email completed billing statement to NABCO at [gappptd@nabenefits.com](mailto:gappptd@nabenefits.com) by the 5<sup>th</sup> of each month.*

***On the 10<sup>th</sup> of each month, NABCO will charge the Credit Card that is currently maintained on file the total amount based on the billing statement submitted to us by the 5<sup>th</sup> of each month.***

***If no changes are received, NABCO will process the current monthly premium based on the prior months reported lives, payroll, and paid premium.***

*Please feel free to contact your NABCO account manager if you have any questions or concerns.*