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**BenefitMall Express Applications**

New Broker Setup

**Step 1 – Complete All Information Below**

BenefitPoint ID #:

BSE:

Name:

Agency:

Address:

City:       ST:    Zip:

Estimated Total Size of the Broker’s Total Book of Business:

Active BenefitMall BOB:

Number of New Cases in Last 6 Months:

Annualized Premium Requirement1:

Comments:

**Step 2 – Receive Market Director Approval**

Print Name:

Title:

Sign: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step 3 – Complete Broker Meeting**

1. Completed Training/Demo  [ ]
2. Handed out User Guide [ ]
3. Signed Service Agreement [ ]
4. Notified Broker of Weekly Webinars [ ]

**Step 4 – Submit Forms for Broker Setup**

Email this completed form and the signed BenefitMall Express Applications Service Agreement to Sam Pevehouse at Sam.Pevehouse@BenefitMall.com. Please allow 24 hours for set up to be complete.