

## **Sole Proprietor Checklist:**

Welcome to the Business Council of Westchester! If you are interested in enrolling in one of our Sole Proprietor plans please note we require the following:

- € Completed group application.
- € Completed Enrollment forms (Please make sure all dates of birth and SSN are on the form and legible).
- € A copy of your MOST RECENT tax documentation (i.e.- Schedule C, K-1)
- € A Check made out to ***Tri-State Special Marketing*** for the first Premium
  - All the Oxford plans require quarterly payment \*No Exceptions\*. If you enroll on Oxford mid-quarter, pay the premium due for the remaining months in the quarter. Example: If you enroll February 1<sup>st</sup> the check will be for the months of February & March.
  - If you do not want to pay quarterly you have go onto our direct debit program (Electronic Funds Transfer “EFT”) contact our office for the form.
- € Return everything to Michaels and Associates. Our address is 80 Business Park Drive, Suite 306, Armonk, NY 10504.
- € Feel free to contact our office with any questions or concerns at (914) 273-4723.