

Simplify The Paperwork Process

Here are some helpful tips to keep in mind when submitting New Business paperwork.

Training

 If applicable in your state, you must complete the required product-specific training and state approved continuing education course before soliciting the sale of an annuity product. New business will be rejected and returned if your required training is not completed.

Forms

- Be sure to use the correct version of each form based on the state in which the application is signed.
- The signature dates should be the same on all forms. Paperwork must be received within 30 days of the sign date.
- If any sections are scratched out, the client must initial the change.
- If a separate beneficiary sheet will be submitted, it must be dated and signed by the owner.
- The following point-of-sale forms must be signed and dated by you and the client on or before the date the application was signed: Client Financial Disclosure Form, Replacement Notice and Comparison & Disclosure Form.
- For all transfer cases, please include the **transfer company's street address and phone number** on the Transfer/Rollover form.
- For the most up-to-date forms, log into **GAconnect.com**.

Suitability

- The Financial Inventory Worksheet is required for all IRA and non-qualified cases that are \$250,000 and over. However, we recommend this form be completed for all IRA and non-qualified sales as it may be requested to verify the suitability of the sale.
- Keep the client information you gather to determine suitability for the time period required by your state.

Other considerations

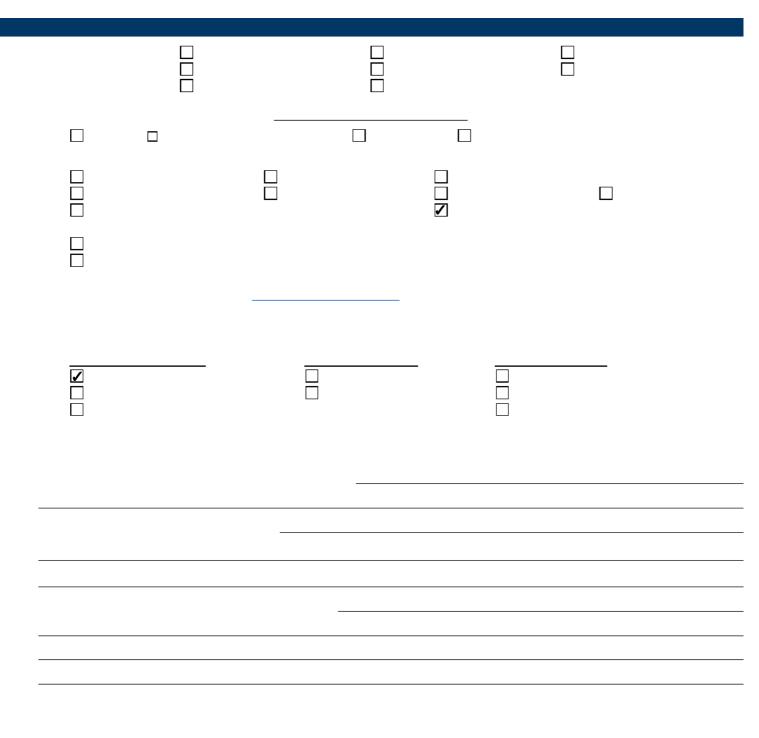
- If the new contract is funded with tax-qualified funds, and the owner is over age 70½, then the required minimum distribution (RMD) must be satisfied prior to funds being transferred.
- Our overnight address is Great American Insurance Group Tower, 301 E. Fourth St., 8th floor, Cincinnati, OH 45202

State-specific information

- The following state-specific point-of-sale forms must be signed and dated by you and the client on or before the date the application was signed: Wisconsin Preliminary Contract Summary, Vermont Fixed-Indexed Annuity Overview, Kansas Single Premium Deferred Annuity Disclosure Form and Massachusetts Notice to Applicants for an Annuity Insurance Information Practices.
- In NAIC 2000 Model Replacement States, a replacement notice must be completed for all cases involving a replacement.
- In accordance with state requirements, residents in Massachusetts, Minnesota, Oregon, Utah and Washington are only permitted to purchase annuity products within their resident state.



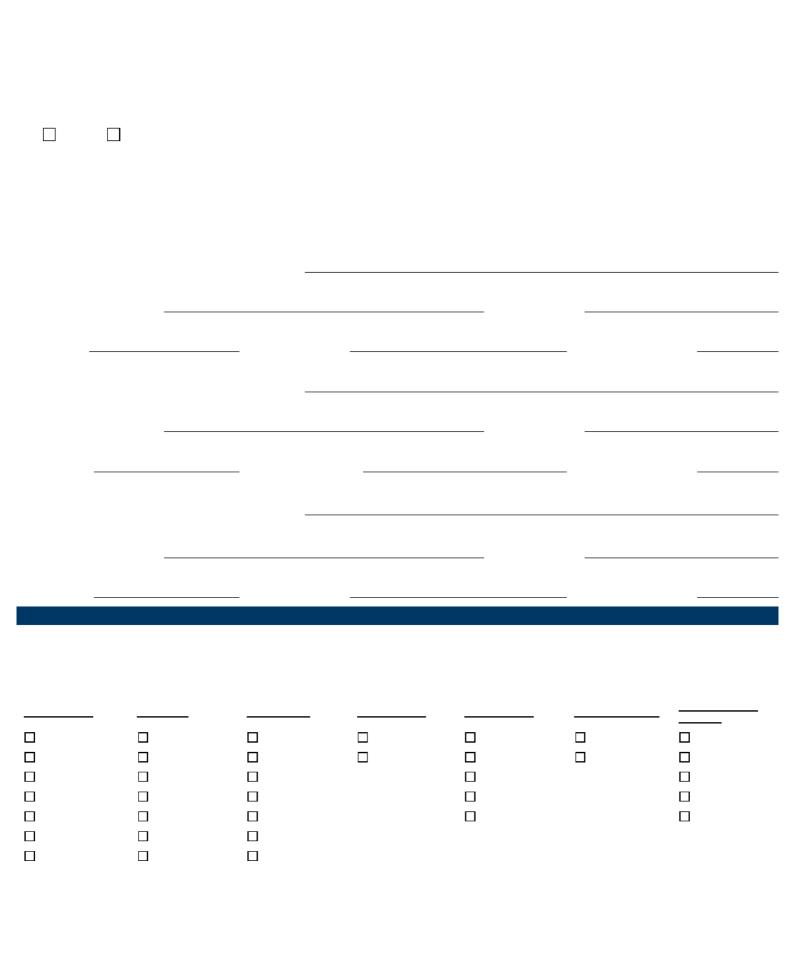
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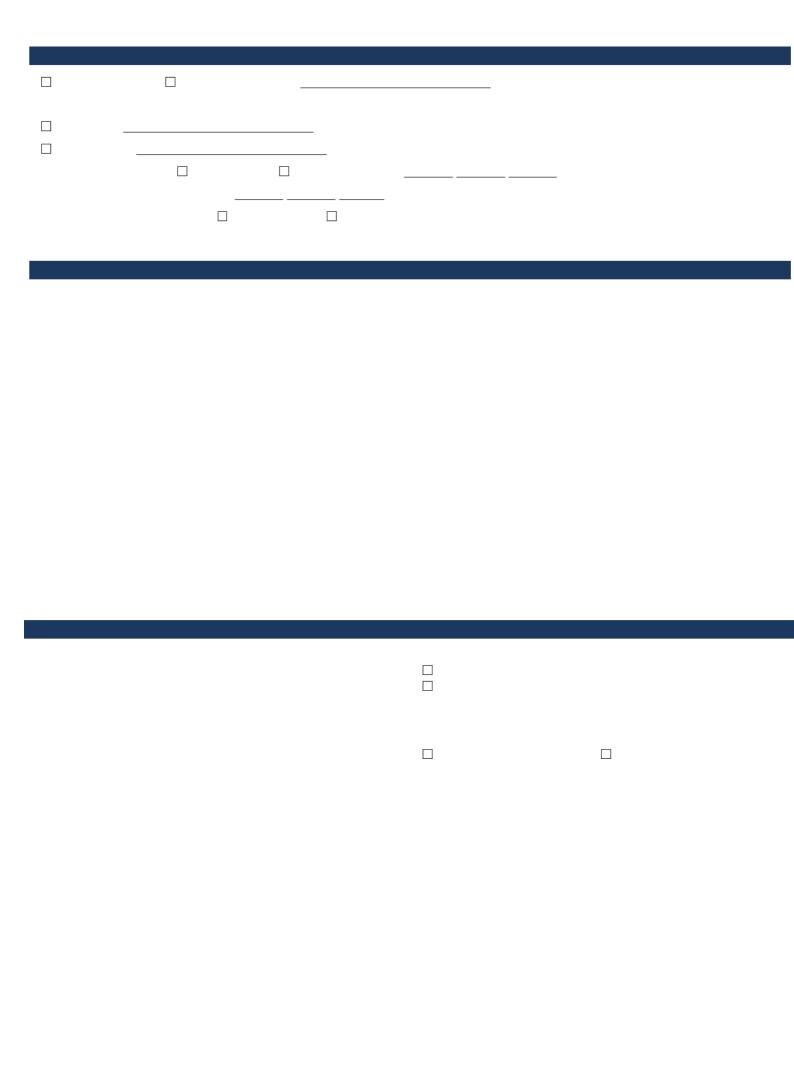
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