

Delaware Life Pinnacle MYGA Paperwork checklist:

Always needed

Application

W9 – if there are joint owners, both need to fill this out

Product Disclosure – it has a line for owner's signature, if joint both can sign on that line

Replacement Form if in an NAIC state whether or not you are replacing – those states include CT, IL, MI, NJ, OH, RI

Non-Resident form if the client lives in another state than where they are signing the application

And If it is a transfer or 1035

Transfer/1035 form

Replacement form no matter the state

If there is a trust as owner or beneficiary

Trustee form is needed – no trust documents needed

If there is a not for profit as owner

Non-natural owner form is needed

If there is a POA signing

The POA form and a copy of the POA document needs to be submitted

These forms can be found at www.MidwoodFinancial.com on the Advisor Link

Any other questions on Delaware Life please call Summer Przybylak at 866-959-1010 x706 or Summer@midwoodfinancial.com