

Submitting Additional Purchase Payments?

Here are some helpful tips to keep in mind!

Forms

- » The signature dates **should be the same** on all forms. Paperwork **must be received within 30 days of the sign date**.
- » The **Transfer/Rollover form** is required if funds are coming from another company. We may accept the other company's transfer form if it includes the tax qualification.
- » Be sure to use the correct version of the replacement form based on the state in which the application was originally signed.
- » For all transfer cases, please include the **transfer company's street address and phone number** on the Transfer/Rollover form.

Other considerations

- » If funds are being rolled over to an existing IRA and the owner is over age 70½, then the required minimum distribution (RMD) question must be completed on the Transfer/Rollover form.
- » For cases involving a trust, corporation or inherited contract, please contact New Business at 800-438-3398, ext.13521 for any additional forms that may be required.
- » For fixed-indexed annuities, you may submit a Strategy Selection form. If a form is not submitted, funds will be applied according to the most recent allocations that were provided for a new purchase payment.
- » Our overnight address is Great American Insurance Group Tower, 301 E. Fourth St., 8th floor, Cincinnati, OH 45202
- » Rate lock does not apply to additional purchase payments. The rate will be based on the date money is received.
- » For fixed-indexed annuity contracts with a rider, purchase payments received after the first contract year will not receive rollup credits. The annual rider charge will apply to the purchase payment.