

# Delaware Life Pinnacle MYGA Paperwork Checklist

## **Required forms:**

- Application
- Form W-9 – if there are joint owners, each owner will need to complete a form
- Product Disclosure – if joint owners, both owners must sign
- Replacement Form - if NAIC state, must be submitted whether or not you are replacing
- Non-Resident form - if client lives in another state than where they are signing the application

## **Transfer or 1035:**

- Transfer/1035 form
- Replacement form no matter the state

## **Trust as owner or beneficiary:**

- Trustee form is needed – no trust documents needed

## **Not for Profit as Owner:**

- Non-natural owner form is needed

## **Power of Attorney:**

- POA form and copy of the POA document needs to be submitted

## **Suitability:**

- NOT REQUIRED FOR INFINEX

Forms may be located at [www.MidwoodFinancial.com](http://www.MidwoodFinancial.com). Click on Advisor Link.

Any other questions on Delaware Life please call Dee Schmidt at 866.959.1010, ext. 711 or [dschmidt@midwoodfinancial.com](mailto:dschmidt@midwoodfinancial.com)