

Midland National Appointment Instructions and Fixed Annuity Paperwork Guidelines

Agent Appointment Process

- Complete form number 12270Y, ***Financial Institutions: Licensed Only Producer Fixed Agent Application*** (appointment form). Fax *Application* along with a copy of your insurance license to (877) 586-0248.
- Complete the Bank Certification found at <http://mnlbank.agentcertification.com>. Instructions can be found on the MNL Bank Certification Instructions document. Complete the “traditional” version.

An agent must have a MNL Agent number and have completed the required certification prior to submitting any business.

New Business Required Forms

- **Fixed Annuity Application** (11292Y) - Please list product name and rate guarantee period in “Product Selection” top of page three.
- **Disclosure Form** (Dynamic Choice – Required with all applications.
- Verify owner(s) have initialed next to the surrender charge option elected and sign. One copy to Midland, second copy for owner.
- **Suitability Form** (11795Y) – Required with all applications. Please read directions very carefully. Entire form must be completed. Verification of ID is contained in this form
- **Annuity Replacement Form** – Required if your client has an existing or pending life insurance or annuity contract (required for NAIC States with all applications).
- **Transfer Form** (6780Y) – If applicable.
- Please include the estimated premium amount on the application.

DO NOT USE WHITE OUT or alter forms. If you have a correction, cross it out and have the owner/annuitant initial the change.

To order sales materials or if you have paperwork questions, please call your Midwood Financial Key Account Manager:

Michelle Miller
866.959.1010, Ext.712 mmiller@midwoodfinancial.com