

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 UNITED BROKERAGE

Forms may be located at 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