



Fixed Annuity Forms Check List

Your sales resource for critical paperwork

The forms checklist below is for use in all states except New York.

Forms checklist for cash transaction

- Application
- Owner Acknowledgement
- All state required forms
 - Call Internal Wholesaling at 888-237-4210 for specific forms information required in your state.
- Military form
- Suitability form (AGL version or previously approved agency version)

Forms checklist for 1035s/transfers/rollovers

- Application
- Owner Acknowledgement
- All state required forms
 - Call Internal Wholesaling at 888-237-4210 for specific forms information required in your state.
- Military form
- Suitability form (if required)
- Request to transfer funds form or direct rollover form
- State replacement form if applicable
- Churning form (required for Florida only)
- The Inherited/Stretch Individual Retirement Account Form (AGL 850)
- Beneficiary Designation Form (AGL 020)

Smart choice

Let us help you put the power of annuities to work for you

CALL 1-888-237-4210

CLICK AIG.com/Annuities

CONTACT your AIG wholesaler to make an appointment

Annuities issued by American General Life Insurance Company (AGL).

Guarantees are backed by the claims-paying ability of American General Life Insurance Company.

Issuing company AGL is responsible for financial obligations of insurance products and is a member of American International Group, Inc. (AIG).

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