



# 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](http://AIG.com/Annuities)

**CONTACT** your AIG wholesaler to make an appointment

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