

Updated annuity licensing and contracting forms now available.

Effective immediately, please use the Annuity Licensing and Contracting forms listed below for new annuity appointments or to initiate a contract change. They can be accessed on Forms Depot via Connex and SureLC.

When submitting, the annuity 'BX/BY' recruiter code should be used versus the former Life Brokerage recruiter code or indicate 'pending' for new firms. Additionally, the agent's annuity 'BX/BY' code(s) should be included on the annuity new business Agent Report, which accompanies the annuity new business application. Please see additional details and transition rules below.

The current Life/Annuity Licensing and Contracting appointment form(s) will be updated to remove the annuity options and will be applicable for Life appointments only. Target for the update is **September 1, 2021**.

The annuity forms listed below are available for use at the IMO and Producer Level for both AGL and US Life business.

New forms available now for download via Forms Depot and SureLC:

Form Name	Form Number
American General Life Insurance Company (AGL) & The United States Life Insurance Company in the City of New York (US Life) New Agent Application & Appointment paperwork including New Annuity Agency Agreement Contract & Annuity Sales Solicitor Agreement (if applicable)	NEW-ANNUITY-AGENCY-SOLICTR
New Annuity Agency Agreement	BGA-IMO Annuity v030520
Annuity Licensing and Contract Change form	AGLC200638

Forms Depot updates:

Two additional dropdowns have been added for Service Type

1. L&C - Annuity New Agent Contracting
2. L&C - Annuity Agent Maintenance

Service Type:

State:

L&C - Annuity New Agent Contracting:

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Search By	<table border="1"> <thead> <tr> <th>Item ID</th> <th>Description</th> <th>Available</th> <th>Order Qty</th> </tr> </thead> <tbody> <tr> <td>NEW-ANNUITY-AGENCY-SOLICTR</td> <td>American General & United States Life (NY) New Annuity Agent Application & Appointment Paperwork newAgency Contract & Solicitor Agreement</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> <tr> <td>BGA-IMO-ANNUITY</td> <td>Annuity Agency Agreement</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> <tr> <td>IA1001</td> <td>Annuity New Business Transmittal Form</td> <td>On Demand</td> <td><input type="checkbox"/></td> </tr> <tr> <td>L9214</td> <td>Producer Sales Practices Manual - Compliance Manual Agent only Brochure</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> <tr> <td>AGLC100809</td> <td>Agency Business Plan and Profile See Additional Details</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> <tr> <td>AGLC106563</td> <td>Absolute Assignment - Licensing and Commissions See Additional Details</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> <tr> <td>AGLC106546</td> <td>Collateral Assignment See Additional Details</td> <td>Available</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Item ID	Description	Available	Order Qty	NEW-ANNUITY-AGENCY-SOLICTR	American General & United States Life (NY) New Annuity Agent Application & Appointment Paperwork newAgency Contract & Solicitor Agreement	Available	<input type="checkbox"/>	BGA-IMO-ANNUITY	Annuity Agency Agreement	Available	<input type="checkbox"/>	IA1001	Annuity New Business Transmittal Form	On Demand	<input type="checkbox"/>	L9214	Producer Sales Practices Manual - Compliance Manual Agent only Brochure	Available	<input type="checkbox"/>	AGLC100809	Agency Business Plan and Profile See Additional Details	Available	<input type="checkbox"/>	AGLC106563	Absolute Assignment - Licensing and Commissions See Additional Details	Available	<input type="checkbox"/>	AGLC106546	Collateral Assignment See Additional Details	Available	<input type="checkbox"/>	
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Transition rules:

For AGL appointments, the current Life/Annuity appointment and contracting forms will be accepted and processed, if received by September 30, 2021. Effective October 1, 2021, the new annuity appointment and contracting forms mentioned above will be required.

For US Life appointments, the new annuity appointment and contracting forms are required effectively immediately.

For more information, call our National Sales Desk at 888-438-6933, option 2.

Annuities are long-term products designed for retirement.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. For legal, accounting or tax advice consult the appropriate professional.

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AC 661 (08/2021) J684302

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