

New business processing year-end guidelines for 2021 production

Target dates to pay cases

Non-underwritten annuity new business

The Home Office must receive all pending, non-underwritten annuity new business applications and all outstanding requirements by the end of business on **Friday, Dec. 17**.

Life policies and underwritten annuities for all companies

- Underwriting must approve the case.
- The Home Office must receive by end of business on **Friday, Dec. 17**, all delivery requirements, fully completed, including but not limited to:
 - Initial premium
 - Certificates of Insurability
 - Bank draft authorization
 - 1035/Transfer funds received
- Any pending cases with a request for reissue or plan change must be received in the Home Office by end of business on **Wednesday, Dec. 15**, to ensure processing time for both Underwriting and New Business.

Target date for policy changes of inforce policies

Criteria for policy changes

- All policy changes must be received by the Home Office by end of business on **Wednesday, Dec. 15**.
- Underwriting must approve the changes, when applicable.
- Changes include, but are not limited to:
 - Conversions
 - Face increases
 - GIO exercises
 - Reinstatements
 - Reissue of active/paid policies (within 60 days of issue)

Processing options

For fastest processing, upload additional requirements via OneSource Online submission.

Fax	<i>Regular mail</i> <i>Be sure to use the following envelopes:</i>	Overnight delivery for life insurance and annuity business
Annuity: 317-285-1529 Life: 317-285-2137 Care Solutions: 317-285-5115	AUL Annuity: 7-18194 AUL Life Insurance: 7-18194 State Life Care Solutions: 1-18792	The companies of OneAmerica® <i>Attn: Individual Life New Business</i> - OR - <i>Attn: Annuity New Business</i> 250 W. North St. Indianapolis, IN 46202

Products issued and underwritten by the following OneAmerica companies: American United Life Insurance Company® (AUL) and The State Life Insurance Company® (State Life), Indianapolis, IN.

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