

**Field
Bulletin**

Delivery Requirements Change

The timely delivery of policies to clients is an important way of ensuring quality service and promoting client confidence. In support of these efforts, effective April 18, 2022, Accordia Life will retire the practice of paying new business cases prior to all delivery requirements being received in good order. This change is in alignment with industry standards. New business cases submitted on or after April 18, 2022 will be subject to the new guidelines. For additional details, please see below:

What's changing?

- To pay a new business case and place the policy in-force, Accordia Life must have all delivery requirements received in good order. The policy will **not** be placed in-force, and commissions will **not** be released until this condition has been met.

What are the typical delivery requirements?

- Delivery requirements may include the illustration, personal health supplement, delivery receipt, amendments, and disclosures.

How long do I have to submit the delivery requirements?

- Accordia Life allows a generous 60-day delivery period for most states.
- The delivery requirements must be received by Accordia Life within the stated required delivery period or within 60 days of policy issue.
- There may be circumstances in which underwriting may limit to a shorter delivery period.

What if the delivery requirements are not received?

- If premium and delivery requirements are not received, the policy will not be placed in force and no commissions will be paid.
- Drafts for first premium requested through the Electronic Funds Transfer form provided after policy issue will not occur until delivery requirements are received.
- If the initial premium is received without delivery requirements, the premium will be held for a short period of time awaiting delivery requirements and the policy will not be placed in-force. Incomplete delivery may result in premium refund and the policy considered not taken.

If you have any questions or inquiries regarding these updated guidelines, please let us know at newbusiness@gafg.com or contact us at 1-855-887-4487, Option 1.

Accordia Life New Business Team

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