

New business processing year-end guidelines for 2023 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. 15**.

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. 15**, 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 **Friday, 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 **Friday, Dec. 15**.
- Underwriting must approve the changes, when applicable.
- Changes include, but are not limited to:
 - Conversions
 - GIO exercises

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	AUL Annuity: 7-18194	The companies of OneAmerica® <i>Attn: Individual Life New Business</i>
Life: 317-285-2137	AUL Life Insurance: 7-18194	- OR - <i>Attn: Annuity New Business</i>
Care Solutions: 317-285-5115	State Life Care Solutions: I-18792	250 W. North St. Indianapolis, IN 46202

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