

# Annuity Care/Annuity Care II<sup>®</sup> Transition Rules

## Overview

**April 23, 2021** — Last day to submit Annuity Care and Annuity Care II applications with the old rates, where applicable. Submissions must meet the following application and funding criteria:

- **Application:**
  - eApps — eApps must be locked and sent for signature by close of business on **April 23, 2021**, and they must be received in the Home Office by close of business on **May 7, 2021**.
  - Paper apps — Paper apps must be received in the Home Office by close of business on **April 23, 2021**.
- **Funding**
  - Cash — Cash funding must be received in the Home Office by close of business on **April 23, 2021**.
  - 1035 paperwork — 1035 paperwork must be received in the Home Office by close of business on **April 23, 2021**, and it must be funded within 60 days from underwriting approval.

## Timeline

### **April 23, 2021**

- eApps must be locked (apps not yet signed but sent for signature) by close of business.
- Signed paper apps must be received in the Home Office by close of business.
- Cash funding must be received in the Home Office by close of business.
- 1035 paperwork must be received in the Home Office by close of business.

### **April 24, 2021**

- Sales Connection/iPipeline eApps and quoting updated with new rates.

### **May 7, 2021**

- Signed eApps previously locked and sent for signature must be received in Home Office by close of business.

**NOTE:** Products issued and underwritten by The State Life Insurance Company<sup>®</sup> (State Life), Indianapolis, IN, a OneAmerica company that offers the Care Solutions product suite. Annuity Care form numbers: SA34, R508; SA35; ICC15 SA35, ICC15 R521 PPA ND, ICC15 R521 PPA, ICC15 R522 PPA. Not available in all states or may vary by state.