

Updated Systematic Premium Allocation (SPA) Request Form

353NB

Date: April 8, 2021

Effective: Immediately

Effective immediately, a new version of the Systematic Premium Allocation (SPA) Request Form is available on FormsFactory[®]. The updated version of the SPA Form, number O-2882 revised 1-21, replaces versions revised 8-16 and 12-20. The SPA form will be updated in SimpleSubmit[®] in the near future. Until then, the old and new versions of the form will be accepted.

Below is a summary of the updates made to the SPA form:

- The form no longer has separate sections based on the product and when it was sold. Instead, a section on page 1 lists all possible index selections, and page 2 shows index availability by product. When completing the form, review the chart on page 2 to determine the available indexes for product the form is being completed for.
- The Fidelity Multifactor Yield IndexSM 5% ER has been moved to be the first index selection on the form.

Please note: The Fidelity Index is not yet available in Alabama, California, Delaware, Florida, North Dakota, and South Dakota. The Fidelity index selection will be present on the updated SPA form for all states, but if it is elected in a state where it is not yet available, the form will not be accepted.

If you have any questions about this field bulletin please reach out to our Customer Contact Department.

Field Bulletin

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