



Inforce IUL transfer/allocation forms updated with more options for improved experience

Effective April 29, the forms used to request account value transfers and/or changes in premium allocations for inforce IUL policies have been updated to make requests more convenient and user-friendly.

By adding more options, policy holders will no longer need to submit requests multiple times – even with monthly, quarterly or semi-annual premium payment modes.

The impacted products are Max Accumulator+ and Value+ Protector, with three variations depending on product and state.

Across all forms, in **Section C: Transfer Interest Account Values**, policy holders will now have three options:

- One-Time Transfer
- Rate Renewal Allocation (Ongoing transfer - No End date)
- Cancel current scheduled Rate Renewal Allocation as of: _____(MM/DD/YY) (Please check this box if you have an ongoing transfer request and want to cancel future transfers)

Previously, only one-time transfers were available.

Three form variations

There are three variations of the **Request for Change in Allocation of Net Premiums and Transfer of Index/Fixed Account Value** form, depending on the product and state:

- **Max Accumulator+ — all states except New York**
 - Form AGLC108873MAX
- **Value+ Protector — all states except New York**
 - Form AGLC108873VPP
- **New York policies — for both Max Accumulator+ and Value+ Protector**
 - Use Form AGLC108873-NY

Transition rules

The updated forms are available in Forms Depot. Please begin using the new forms immediately.

Previous versions of the forms will be accepted through **May 29, 2022**. However, in order to utilize the newly added transfer option, the new form must be submitted.

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