



Transition guidelines for life insurance application update

Effective October 1, 2022, we'll introduce an updated individual life insurance application (Parts A, B, and C) and supplemental forms, as well as a new updated Part B for individual disability insurance. The new application design encompasses many changes to make it more flexible for use with varying types of cases and to align with industry norms.

The updated application (ICC21) will be used with all currently sold life insurance products—Term, Universal Life, Indexed Universal Life, Survivorship Universal Life, Variable Universal Life (including Executive Variable Universal Life III), in approved states.

Important dates

In order to use the current application (ICC17) for policy issuance, the following dates must be met. No exceptions will be allowed.

October 1, 2022

- Updated Life application, ICC21, is available in all states, except CA, FL, MT, ND, NY, SD, and WY.
- Current application, ICC17, and updated life application, ICC21, can be co-mingled until December 1. Example: Current Parts A and C could be used with the updated Part B or updated Parts A and C could be used with current Part B.

December 2, 2022

- Current life applications, ICC17, will no longer be accepted, unless to satisfy a final underwriting and/or administrative requirement for policy issuance.
- Final underwriting and administrative requirements for policy approval and issuance must be received in our home office for co-mingled and/or complete current ICC17 applications*.
- For co-mingled and complete current ICC17 applications that involve a 1035 Exchange, final underwriting and administrative requirements must be received to start the exchange.

December 30, 2022

- Last day co-mingled and complete current ICC17 applications can be issued by the home office.

Term conversions

Transition guidelines do not apply to term conversions.

Questions?

Call Life New Business and Underwriting at 800-654-4278, option 3, 2

*A complete application is one that includes completed Parts A, B, and C.

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