

Transition Rules

Overview

March 11, 2023

The Annuity Care II 6-year Continuation of Benefits (COB) is available for all cases sold on or after March 11, 2023.

Cases issued between March 11 – April 11, 2023, eligible for new pricing

March 11, 2023

- Quote software reflects availability of 6-year COB. Neither the software nor the home office can generate quotes with the new option prior to this date.
- Advisors that presented the 3-year COB option to clients under 69 prior to this change will have the option to sell with the 3-year COB benefit within one month of the effective date of this change.
- Change requests will be worked as quickly as possible. It is our desire to maintain service levels on all new applications, so requests pertaining to this benefit change may fall outside our normal service standards.

By April 11, 2023

- Requests for 3-year COB benefit for clients ages 69 and under must be received by OneAmerica® no later than April 11, 2023, via email or OneSource Online. Sending a new, unsigned illustration with the request is preferred but not required.

Note: Products issued and underwritten by The State Life Insurance Company® (State Life), Indianapolis, IN, a OneAmerica company that offers the Care Solutions product suite. Annuity Care II Form number: SA35; OR Form number SA35(OR). Not available in all states or may vary by state.