

# New Policy Change applications for underwritten changes

**Date:** February 22, 2024

**Effective:** February 23, 2024

North American continues to look for ways to improve overall experience and streamline processes for you and your clients. We've recently updated the following forms:

Form name	Previous form number series	New form number series
Application for Internal Exchange	ICC19L3215A REV 1-20	ICC23A102NAC REV 1-23*
Application for Reinstatement or Change to Existing Policy (With Underwriting)	ICC19L3214B REV 1-20	ICC23A103NAC REV 1-23*

\*Refer to Forms Factory<sup>®</sup> for state variations.

The above forms will be available on Forms Factory<sup>®</sup> by February 24, 2024. The previous versions of the forms will no longer be accepted if they are signed April 1, 2024, or later.

## Availability

The new forms are available in all states except California.

## State Specific Updates

- South Carolina: Application only is moving from Interstate Insurance Compact (ICC) to non-ICC.
- North Dakota & Delaware: Application and all underwriting questionnaires are moving from non-ICC to ICC.
- Refer to Forms Factory for updated form numbers for the above states.

## Changes to the underwritten applications

Changes were made to several fields on the underwritten applications. These enhancements should be self-explanatory and easy to follow during the completion process. Some notable updates include:

- **Social Security Number:** All fields for the social security number have been updated to be labeled as a request for the social security number or tax identification number.

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## Field Bulletin

- **Email Address:** All roles on the application now include a field to provide the email address.
- **Driver's License:** Questions have been updated so you can easily choose from a list of reasons as to why a client does not have a driver's license, versus having to write in the details.
- **Premium Qualification Test:** Application no longer indicates a default of CVAT. Please note, if no Premium Qualification Test is selected, a requirement asking what Premium Test is preferred will be added.
- **Secondary Addressee Notification:** Field for 'Third Party Billing Notification' was updated to 'Secondary Addressee Notification'. This field is still optional to complete and should be completed if the client wants to indicate an additional party to receive grace period and insufficient premium notices.
- **Premium Certification:** Question was separated into two questions, and the wording was updated to be easier to understand.
  - Based on the prior verbiage, the question would be answered yes to certify that premium was not coming from one of the sources listed.
  - Based on the new verbiage, if premiums are not coming from a source listed, the question should be answered no.
- **Lifestyle and Underwriting/Medical Questions:** Several questions have been updated on the applications. Please be sure to read questions carefully when completing the new application.
- **Authorization Page:** Verbiage in the 'Effective Date' and 'Authorization' section have been updated. Please be sure to review these changes thoroughly to avoid misunderstandings.

**Please contact your dedicated Policy Change team with any questions.**

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