



# Annuity Application Instructions for Producers

Issued by American National Insurance Company / One Moody Plaza, Galveston, TX 77550-7947

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Springfield, MO 65899-0001 / **Phone** 1-800-252-9546  
**Mailing Address** PO Box 10427, Springfield, MO 65808-0427



## Before Completing an Annuity Application

- ✓ Ensure all appointment paperwork is complete according to state regulations
- ✓ Complete the two required forms of AML training
- ✓ Complete all State Mandated Continuing Education
- ✓ Complete American National's Annuity Product Training Course

► **NOTE:** Training completion is required PRIOR to signing an application

## Completing the Annuity Application

Required Forms	Palladium MYG	ANICO Strategy PLUS 7 & 10	WealthQuest Citadel 5 & 7	Palladium Immediate Annuity
Annuity Application (Form Series 11059)	✓	✓	✓	✓
Annuity Application Product Page		✓ (Form Series 11288)		✓ (Form Series 11287)
Product Disclosure	✓ (Form Series 4888)	✓ (Form Series 11151 or 11152)	✓ (Form Series 10601)	✓ (Form Series 10275)
Annuity Application Producer's Report	✓ (Form Series 11059-A)	✓ (Form Series 11059-A-ASIA)	✓ (Form Series 11059-A)	✓ (Form Series 11059-A)
Annuity Suitability & USA Patriot Act Form (Form Series 4465-NAIC)	✓	✓	✓	✓
Producer Disclosure for Annuities (Form 11207)	✓	✓	✓	✓
Lifetime Income Rider Disclosure (only required if rider is added)		✓ (Form Series 11154)		
Withholding Certificate for Annuity Payments (Form W4-P)				✓
ACORD 1035 Exchange / Rollover / Transfer eForm	<b>Required:</b> If funding is coming from a qualified or non-qualified source.			
State Replacement Forms	<b>Required:</b> If the application is replacing an existing annuity or life insurance policy or if the annuity owner's state requires submission			

► **NOTE:** Additional forms may be required depending on your state and client's financial needs

## Submitting the Application and Follow Up

- Best practice is to submit an electronic application using either FireLight or Expert App and receive a policy number instantly
- Electronically scan the full application using ExpertScan in the agent portal and receive a policy number instantly
- The application can be mailed to the address located on the top of this form
- Applications are reviewed for good order typically within 48 - 72 hours of receipt by the Home Office
- Track the application status and review any pending requirements in the Policy Inquiry portal

\*This form is for instructional purposes only and is not required to be returned