

Product & Service Notice



Date: August 1, 2024
To: Ameritas Field Associates
RE: New Service Forms for Disability Income Insurance Policies - Revised

Form Number: PS 4442 REVISED
Product Area: DI

Summary: Effective immediately, new policy service forms are available for individual disability income policies in states that have approved Dnamic Cornerstone Income Protection®. This change does not apply to policyholders in states where Dnamic Foundation is being sold or policyholders with Dnamic Fundamental® policies. The revision is highlighted below.

The new forms must be used for servicing policyholders with individual DI or Business Overhead Expense policies, even if these policies were issued under a prior DI product series (Dnamic 2000 or Dnamic Foundation).

To help avoid delays processing service requests, we've identified the new forms and hyperlinked them below. We've also identified the old Dnamic Foundation forms that can be used for states where Dnamic Cornerstone® is pending. Note, if old forms are submitted in states where Dnamic Cornerstone is approved, we will require the new forms to be completed before your clients' request can be processed.

Name of Form/Change Request	New Forms Dnamic Cornerstone approved states	Old Forms Dnamic Foundation
Application for Benefit Increase: Exercising the Benefit Increase Rider or Future Increase Rider.	DI 5200 INC (cover page and form)	UN 0130
Application for Policy Change: Adding or canceling riders, changes to benefit or rider amounts, elimination or benefit periods, premium modes, and other miscellaneous requests.	DI 5220 CH	UN 2852 BH
Application for Change of Coverage or Reinstatement: Reinstating policies or making policy changes (DI 5220 CH) that require underwriting consideration.	DI 5225 CH-R	UN 1799 and UN 2387
Student Loan Supplemental Application: Adding the Student Loan Repayment Rider at or after policy issue.	DI 5300 SLR	UN 5021
Supplemental Application for Business Loan Repayment: Adding the Business Loan Repayment Rider at or after policy issue.	DI 5350 BLR	UN 1863
Electronic Fund Transfer: Changing or adding banking information.	UN 2178	UN 1917

These forms are available on Producer Workbench under [Service Request/Forms](#) as well as the Client Service System when selecting the Forms tab for the specific client (screenshot below).



Client Service System

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Please click the links below to download any of the forms.

Note: After downloading your desired form and filling it out online, you still need to print, sign, and mail the form to the Home Office.

The forms listed in Client Service System will differ from the forms accessible by the client. The client is not able to see all of these forms.

The Dnamic Foundation agent guide, DI1228 will be updated to include these changes.

For questions about this notice, please contact the Ameritas sales development or the client services team at 800-555-7746.

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In approved states, Dnamic Cornerstone Income Protection[®] (forms 4601NC and 4602GR), Dnamic Foundation (forms 4501NC, 4502GR and 4503NCBOE) and Dnamic Fundamental[®] (form 4504LS) are issued by Ameritas Life Insurance Corp. In New York, Dnamic Foundation (forms 5501-NC, 5502-GR and 5503NCBOE) and Dnamic Fundamental[®] (form 5504-LS) are issued by Ameritas Life Insurance Corp. of New York.

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