



# SPIA New Application Cover and Instructions

<b>Fax Applications To: 855.710.7421</b>	<input type="checkbox"/> New Application <input type="checkbox"/> Additional forms or corrections for application
	Policy Number:
Annuitant's Name	Producer # (s)
Agent's Name (s)	Agent Fax #
Phone Number	Email

Notes/Comments

- Application checklist:**
- Both application pages are present and all fields have been completed.
  - Annuitant/Owner's personal information has been verified correct.
  - At least one beneficiary is named (Attached supplemental beneficiary form if more than 2).
  - Replacement forms are enclosed if applicable.
  - Any required state specific forms are complete and attached.
  - Direct Deposit authorization is enclosed.
  - Is any portion of the policy funded with a personal check, bank check, or money order? Please enclose the payment and MAIL the entire application only.
  - If Policy is funded by 1035 exchange or rollover from another company and exchange/rollover authorization form is enclosed.
  - If Policy is funded by ACH withdrawal and authorization is enclosed.

- All applications must be submitted according to the following order:**
- 1) SPIA New Application Cover and Instructions form .
  - 2) Single sided pages 1 and 2 of the application in sequential order.
  - 3) Supplemental forms such as replacement forms and any state specific requirements.
  - 4) Direct Deposit Authorization
  - 5) Payment form(s)

Please be sure to fax the application pages single sided & in sequential order. If necessary, convert the application to a single sided document by photocopying the applications.  
**Applications may be submitted via Fax or Mail (Please only choose one)**

- Reminders:**
- If submitting by mail, please use a paper clip to separate each application; mailing address is: 12800 Whitewater Dr. Ste 100, Minnetonka MN 55343
  - Information regarding application and policy status, commissions, business reports, policyholder correspondence and more is available at MyNGLConnect please log on to [www.MyNGLConnect.com](http://www.MyNGLConnect.com)