

Announcements

Non-Qualified 1035 Exchanges

If you are using Form 4394-NQ to direct the transfer of non-qualified funds to a new annuity application, please do not complete the section at the bottom of the first page that refers to a 1035 Exchange with loan value. This section only applies when transferring existing cash value, including a loan, from a life contract to our new ANICO Indexed Universal Life. This section does not apply to annuity sales.

Reminder: If you are rolling over funds from a qualified plan such as an IRA, 457, etc., please use Form 4394-Q. The definitions for the appropriate use of this form can be found on the third page of 4394-Q.

Both 4394-NQ and 4394-Q can be found in Virtual Forms on the IMG Web site at www.img.anicoweb.com or can be ordered through Supply Order on the Home page of the Web site.



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