

**DATE:** February 19, 2010  
**TO:** All American Equity NMO's and Agents  
**FROM:** Jamie Moher, Senior Vice President - Suitability  
James Jones, Vice President - Marketing Services  
**RE:** Certification of Trust Agreement - Form #4258

Please see the above referenced form, copy attached, for use if a Trust is listed as the Owner on the Annuity Application. We created this form in an effort to make the Application and Suitability process smoother when a Trust is involved. Please begin using this form immediately.

**Please note :** this form is only required if a Trust is listed as the Owner. In addition to this form, we must also receive a copy of the Cover Page and a copy of the Notarized Signature Page of the Trust. Only a Trustee may complete the *Certification of Trust Agreement* . Also note that if the Annuitant is someone other than the Grantor or Settlor of the Trust, a *Trust Statement of Understanding* Form 4268 must also be completed.

Again, we created this form in response to our own feedback and your requests to make the Application and Suitability process smoother when a Trust is involved. We hope that you find this new form useful and strongly believe this will improve the process for everyone.

For more information or to order supplies, please visit our website at [www.american-equity.com](http://www.american-equity.com) or call Marketing at 888-647-1371.

[Click here for the Certification of Trust Agreement form](#)

[Click here for the Trust Statement of Understanding form](#)

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Form # Cert of Trust 02/19/10

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