

DATE: June 5, 2009
TO: All American Equity NMO's and Agents
FROM: Nick Gerhart, Vice President of Compliance Communications and
James Jones, Vice President of Marketing Services
RE: Confirmation Call System

IMPORTANT INFORMATION...PLEASE READ CAREFULLY

American Equity is proud to introduce The Confirmation Call System to all of our agents. This is an exciting new resource for producers to properly document the sales process. Confirmation Call will help producers confirm and document the important elements of each transaction they enter with their clients. We are making this service available to our producers at no cost. You may use this system with each American Equity product you sell.

It is not unusual to have one of your past sales come under intense scrutiny months or even years later. In fact, it is expected that this will happen to you if you maintain any level of sales volume over a period of time.

Please click on the link below for an informational tutorial on the Confirmation Call System or log on to our agent website and click on the Confirmation Call icon.

Please feel free to contact the Marketing Department at 888-647-1371 with any questions.

Thank you for your continued business and support!



Financial Markets, Inc.

800-888-2829

www.fm-inc.com - Marketing@fm-inc.com

[Confirmation Call Tutorial](#)

www.american-equity.com

24/7 Download Forms, Check Contract Status or Commission Statements



West Des Moines, IA 50266

Call us at **888-647-1371**

8:00AM-5:30PM CT Monday-Thursday 8:00AM-1:00PM CT Friday

We're the One!
People Service Future



INSURANCE MARKETING
STANDARDS ASSOCIATION

Confirmation Call 6/05/09

For Agent Information Only. Not for use in solicitation or advertising to the public.

[CLICK HERE TO OPT OUT OF THESE EMAILS](#), or call marketing at 866-233-6660, or fax us at 515-225-6314. American Equity's failure to comply with your opt out request within 30 days is unlawful.



P.O. Box 712
Des Moines, IA 50325
877-227-0903
www.american-equity.com

CONFIRMATION CALL

Confirmation Call Assigned Number: _____

Please Note: This document is used for tracking and record keeping purposes. It is very important to have the above Confirmation Call Assigned Number clearly written on this form.

Suggested topics to be covered on the Confirmation Call:

- How agent and client met
- Outline particular issues that led the client to seek agent's assistance
- Outline how the particular product is meeting the client's needs
- Why the client decided to purchase the annuity
- Address surrender charges and length of surrender charge period
- Address the client's need for liquidity and the liquidity available with the annuity

Agents: Please make it clear to your client on the phone call that you are a licensed insurance agent and did not provide tax, legal or investment advice (unless you are properly licensed to do so).

Agent Name/Agent Number

Agent Phone Number

Client Name(s)

Client Social Security #(s)

\$ _____
Proposed Amount

State Application is signed in

Product

I agree that the statements made on this phone call are accurate as of the date it was recorded.

Owner's Signature

Joint Owner's Signature

Agent's Signature