

Effective 04-01-24

Forms information

Consumer Profile Form (32906Y)

- Required for all deferred annuity sales.

Comparison of Annuity Contracts Form (32907Y)

- Required for all annuity-to-annuity replacements EXCEPT Arkansas and Nevada.

Other/Miscellaneous Forms:

- BlackRock Index/Fidelity Multifactor Yield Index 5% ER Disclosure Supplement (34556Y)

State-specific forms information

Alabama:

- Alabama Arbitration Agreement (I2538Y-01): Required for all annuity sales.

Arkansas:

- AR Replacement Disclosure Comparison Statement (I2338-AR): Required for all replacements.

California:

- CA Elder Disclosure (7572Y): Required if owner's age is 65 or older.
- CA Home Visit Form (9299Y): Required to be sent to clients age 65 and older prior to first home visit.
- Medi-cal Eligibility Written Disclosure (35574Y): Required by any agent who offers or sells any financial product on the basis of its treatment under the Medi-Cal program.

Florida:

- Replacement Form (6153-A): Required upon client request.
- Replacement Forms (6779-FL and 6153): Required for internal replacements.

Kansas:

- Replacement Form (6779-KS-A): Required for internal replacements.
- Single premium disclosure form (6778-KS)

Nevada:

- NV Replacement Disclosure Comparison Statement (I2338-NV): Required for all annuity-to-annuity replacements.

Ohio:

- Single premium disclosure form (6778-OH)

Disclosure & allocation forms

5-Year Disclosure Form 29133D-NAV5-1

7-Year Disclosure Form 29133D-NAV7-1

**For more information, please call the
Sammons Retirement Solutions[®] Sales Desk
at 855-624-0201.**

State	Navigate 5 and 7	Application	Replacement notice
AK	X	ICC18-27473H	6779*
AL	X	ICC18-27473H	6779*
AR	X	ICC18-27473H	6779*
AZ	X	ICC18-27473H	6779*
CA	X	28004H-04	6779-CA
CO	X	ICC18-27473H	6779*^
CT	X	ICC18-27473H	6779*
DC	X	ICC18-27473H	6779
DE	X	ICC18-27473H	6779-DE
FL	X	28004H-09	6779-FL
GA	X	ICC18-27473H	6779
HI	X	ICC18-27473H	6779*
IA	X	ICC18-27473H	6779*
ID	X	ICC18-27473H	6779-ID
IL	X	ICC18-27473H	6779-IL A & B
IN	X	ICC18-27473H	6779-IN
KS	X	ICC18-27473H	6779-KS-B
KY	X	ICC18-27473H	6779*
LA	X	ICC18-27473H	6779*
MA	X	ICC18-27473H	6779-MA
MD	X	ICC18-27473H	6779*
ME	X	ICC18-27473H	6779*
MI	X	ICC18-27473H	6779
MN	X	ICC18-27473H	6779-MN
MO	X	ICC18-27473H	6779-NAIC*
MS	X	ICC18-27473H	6779*
MT	X	ICC18-27473H	6779*
NC	X	ICC18-27473H	6779*
ND	X	28004H	6779
NE	X	ICC18-27473H	6779*
NH	X	ICC18-27473H	6779*
NJ	X	ICC18-27473H	6779*
NM	X	ICC18-27473H	6779*
NV	X	ICC18-27473H	6779-NV
OH	X	ICC18-27473H	6779*
OK	X	ICC18-27473H	6779-OK
OR	X	ICC18-27473H	6779*
PA	X	ICC18-27473H	6779-PA
RI	X	ICC18-27473H	6779*
SC	X	ICC18-27473H	6779*
SD**	X	28004H	6779*
TN	X	ICC18-27473H	6779-TN
TX	X	ICC18-27473H	6779*
UT	X	ICC18-27473H	6779*
VA	X	ICC18-27473H	6779-NAIC*
VT	X	ICC18-27473H	6779*
WA	X	ICC18-27473H	6779-WA
WI	X	ICC18-27473H	6779*
WV	X	ICC18-27473H	6779*
WY	X	ICC18-27473H	6779-WY

* A replacement notice is required if the applicant owns an annuity OR life insurance policy.

^ In the state of Colorado, if a resident purchases a life insurance or annuity contract outside the state of Colorado involving a replacement, the issuing company must receive the Colorado replacement form along with the replacement form required for the state in which the application is signed. If that replacement form is the same version Colorado uses, only one replacement form is required.

** In the state of South Dakota, the Nursing Home Waiver is not available.