

New Traditional Annuity Application for Old Mutual Producers

The Old Mutual traditional annuity application has been recently revised to reflect new state and federal requirements. Specifically the "Know Your Customer" and fraud language has been made part of the application, previously part of the Confirmation Statement.

Effective immediately, the newly revised and reformatted traditional annuity application [OMAD6227 (08-2009)] has replaced the current version contained in the product Consumer Brochure. There are only two states that have not approved the new traditional annuity application – Louisiana and New York.

Transition rules for the new traditional annuity application are as follows:

- There will be a 60 day transition period to begin using the new application. In states where approved, agents should begin using the new application May 10, 2010.
- After July 12, 2010, the old traditional annuity application will be returned to the agent and the new application will need to be completed and resubmitted.

If you have any questions, please email us at salesmarketing@omfn.com.

Thank you for your continued business!

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