

- ❑ NWL Product Specific Training is required to be completed prior to solicitation of Annuity business. Applications submitted before PST is completed will be declined.
- ❑ Check the product issue ages and minimum premium requirements and make sure your case meets these requirements.
- ❑ Common 'Not In Good Order' (NIGO) issues to avoid:
 - Be sure to complete the Plan section of the Application For Individual Annuity form indicating the product being applied for and the tax status.
 - All forms need to be signed and dated where indicated. The signature dates need to match on all forms. If a signer has a title (ex: Trustee), that title needs to be included on all signatures.
 - Any product disclosures or consumer brochures submitted need to match the product or rider being applied for.
 - Answers provided to the replacement questions on the Application For Individual Annuity and the Suitability Questionnaire must match.
 - If transferring funds, make sure all of the distributing company information is provided in Section 2 of the Authorization To Transfer Funds form.
 - Corrections made to any form are required to be initialed and dated by the client.
- ❑ NWL accepts wire transfers and checks as payment for a policy's initial premium. If a check is being submitted, please note the following:
 - Checks made payable to National Western Life should not include signatures on the back of the check ("For Deposit Only To NWLIC" is acceptable).
 - Starter checks must be accompanied by a letter from the issuing bank indicating the owner/annuitant's account has been established for a minimum of 3 months.
 - Cashier's check purchased by the owner/annuitant must also include the purchase stub.
 - When submitting checks issued by another company made payable to or "For the Benefit Of" the policyholder, the payee must endorse the check first, including any applicable titles, and legibly write "Pay to the order of National Western Life."

Example:

John Doe Revocable Trust

John Doe Trustee

Pay to the order of National Western Life

Annuity New Business Cover Sheet

Upload, fax or mail the annuity application, all required documentation, and this cover sheet.

National Western Life Insurance Company® requires all agents to complete NWL® Product Specific Training prior to soliciting annuity business. If Product Specific Training is not completed prior to the application signed date, the application will be declined.

National Western Life - Annuity New Business Contact Information

Annuity New Business Phone (800) 760-3434 option 1, option 3

Annuity New Business Fax (512) 719-8507

Overnight Mailing Address 10801 N Mopac Expy, Bldg 3
Austin, TX 78759-5415

Annuity Case Information

Agent Name _____ NWL Agent # _____

Agent Phone Number _____

Case Manager Name _____

Case Manager Email _____

Annuitant Name _____

Type of Funding Cash Transfer/ 1035 Exchange Other _____

Notes/Special Instructions
