Annuities issued by
The United States Life Insurance Company in the City of New York (US Life)

Fixed Annuity Forms Checklist for New York

The forms checklist below is for New York only.

Forms checklist for cash transaction

- ☐ Application
- ☐ Owner Acknowledgement
- ☐ Military form (if answer to military question is "yes")
- ☐ Suitability form (US Life version or previously approved agency version)
- ☐ Definition of Replacement

Forms checklist for replacement

Stage 1

- ☐ Definition of Replacement
- ☐ Agents Request for Disclosure Statement and Policyowner's Authorization

Stage 2

- ☐ Completed Stage 2 Regulation 60 (Reg 60) Forms
  - — Important Notice
  - — Disclosure Statement
  - — Request to Transfer
- ☐ Application
- ☐ Owner Acknowledgement
- ☐ Military form (if answer to military question is "yes")
- ☐ Suitability form (if required)

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