

First SunAmerica Forms Checklist

Your sales resource for critical paperwork

The forms checklist below is for New York only.

Forms checklist for cash transaction

- Application
- Owner Acknowledgement
- Military form
- Suitability form (FSA 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
- Suitability form (if required)

CALL

1-888-237-4210

CLICK

FSAannuity.com

CONTACT

your First SunAmerica
wholesaler to make
an appointment

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