

Replacement Forms & Requirements

As of August 1, 2009

State requirements vary and should be followed carefully. It is also important to use the correct replacement form(s) for your state. In addition, many states have a Sales Material Certification section in the replacement form. This section must be completed and signed by the agent. Below is a grid outlining the requirements by state. If you have any questions, please call Americo Sales Support at 800.231.0801, ext. 8410.

Please use these new forms immediately. After September 1, 2009, if any old replacement forms are submitted, business will be delayed. Form numbers below in **RED** indicate a new replacement form is needed for that state.

With the exception of CT, DC, ND, VI, and Cayman Islands, agents must leave applicant with copies of all sales materials and replacement forms.

State(s)	Applies to:	Required Form(s)	When to use a replacement form:	Other
CT, DC, ND, VI, Cayman Islands	N/A	N/A	N/A	N/A
AK, CO, HI, IA, KY, LA, ME, MD, MT, NE, NH, NM, NC, OH, OR, RI, TX, UT, VA	Life & Annuities	AAA8327 (2008)	Required if there are any existing policies.	N/A
DE, ID, MN, MO, WY	Life & Annuities	AAA8327 (2008)	Required only if a replacement is involved.	N/A
AR	Permanent Life (does not include term)	AAA8327 (2008)	Required if replacement is suggested by agent or if a replacement occurs.	N/A
AZ	Life & Annuities	AAZ8327 (2008)	Required if there are any existing policies.	N/A
CA	Life & Annuities	ACA8328 (2008) ACA8327 (2008) (Internal)	Required only if a replacement is involved.	N/A
FL	Life & Annuities	AFL8328 DI4-1180	Required only if a replacement is involved.	Agent must complete DI4-1180 for internal replacements with 1035 exchange.
GA	Life	AAA8327 (2008)	Required only if a replacement is involved.	N/A
IL	Life & Annuities	AAA8327 (2008) AIL8328 (2008)	Required only if a replacement is involved.	A copy of AIL8328 does not need to be left with the applicant.
IN	Life & Annuities	AAA8327 (2008)	Required only if a replacement is involved.	Must leave ORIGINAL version of sales materials with applicant.
KS	Life & Annuities	AKS8328 (2008) (External) ABB8327 (2008) (Internal)	Required only if a replacement is involved.	N/A
MA	Life & Annuities	AMA8327 (2008)	Required only if a replacement is involved.	N/A
MI	Life & Indexed Annuities	AMI8328 (2008) AMI8327 (2008)	Required only if a replacement is involved.	N/A
NJ	Life & Annuities	ANJ8327 (2008)	Required if there are any existing policies.	N/A
NV	Life & Annuities	ANV8328 (2008) (Life) ANV8327 (2008) (Annuities)	Required only if a replacement is involved.	Agent must keep a copy of the replacement form and sales proposals for 3 years.
OK	Life & Annuities	AOK8328, AOK8327	Required only if a replacement is involved.	N/A
PA	Life & Annuities	APA8328	Required only if a replacement is involved.	Agent must complete Disclosure Statement 52181A 05.1 for all life business.
PR	Life & Annuities	APR8327 (2008)	Required if replacement is suggested by agent or if a replacement occurs.	Agent must keep a copy of the replacement form for 2 years.
SC	Life & Annuities	ASC8327 (2008)	Required if there are any existing policies.	N/A
SD	Life & Annuities	ASD8327 (2008)	Required only if a replacement is involved.	Applications will be held for 10 days before being issued per replacement regulation.
TN	Life	AAA8327 (2008)	Required only if a replacement is involved.	If replacing, agent holding state license less than 120 days must complete replacement notice and submit to Americo and wait 10 days before taking the application.
WA	Life & Annuities	AWA8328	Required only if a replacement is involved.	N/A
WI	Life & Annuities	AAA8327 (2008)	Required if there are any existing policies.	Agent must keep a copy of the replacement form for 3 years.
WV	Life & Annuities	AAA8327 (2008) AWV8327 (2008) (Life)	Required if there are any existing policies.	N/A

Americo does not conduct business in AL, MS, NY, or VT.

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