



## Client Profile form update

An updated Client Profile form is scheduled to launch on Monday, **August 13, 2018** and will be available on all forms repositories.

The new form is designed to improve efficiency in obtaining information and reduce the number of Not In Good Order (NIGO) cases attributed to incomplete forms.

### The updated Client Profile form applies to the following annuity types:

- Index annuities
- Fixed annuities
- Income annuities

### Applicable firms:

All firms where AIG is currently responsible for the suitability supervision process.

### Transition period

- **Sunday, November 11, 2018** – the previous version of the Client Profile form will be accepted on or before this date if received In Good Order.
- **Monday, November 12, 2018** – the updated Client Profile form will only be accepted with New Business submissions.

AC 488 (07/2018) J141401

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