

Great American Financial Resources

Over-Size Case Questionnaire

The following are questions to be answered for an annuity new business case which exceeds the premium requirements for current products underwritten one of our insurance subsidiaries: Great American Life, Annuity Investors Life and/or Loyal American Life. Please note all questions have to be answered before a rate, compensation or oversize case request is reviewed by the home office. This questionnaire has to be completed by the agent/agency and e-mailed or faxed to Jason Hitch (jhitch@gafri.com and fax 513.412.8408) before Home Office will respond or approve.

Over-Size Case Questions:

Required Information - Agent:

Date of Case Information _____

Name of MGA and Writing Agent _____

Are all agents or agencies contracted with GAFRI? _____

Name and Age of contract Owner and Annuitant
 Owner _____
 Owner's Age _____
 Annuitant _____
 Annuitant's Age _____

Premium amount for case \$ _____

Source of Funds _____

Which company and product is to be used for this case? _____

If Index Annuity, % allocation of funds to strategies? _____

What day will GAFRI receive funds _____

State for new contract _____

Qualified/NonQualified _____

Will there be expected withdrawals? _____

Will there be expected early annuitization? _____

Additional Information (if applicable) - Agent

1. Is non-assignability acceptable? _____
2. Will GAFRI need to review any special documents? _____
3. Any Special death benefit provisions? _____
4. Is this a Guaranteed Income Contract rollover? _____
5. Is it subject to ERISA? _____

Required Information - Home Office:

6. Treasury rate at time of information taken above/date rate _____ date _____
7. Will not take case if treasury rate falls below this rate rate _____
8. Will not accept this case if funds are received in Home Office after this date _____

By signing below I am agreeing that all of the information included above is accurate to the best of my knowledge.

 Agent
 Signature/Date

 Managing Agency (up-line)
 Signature/Date

 Phone Number