

Annuity Transfer-Out Request

To request a transfer out of an annuity, please send the following documents to us:

1. **Transfer form** – you can use our form or the receiving company form as long as it is substantially similar to our form
2. **Replacement form** – signed by the owner(s) and agent
3. **Illustration or Certificate of Disclosure** - of the product that will be purchased by the owner(s) at the receiving company
4. **Acceptance by the receiving trustee**
5. **Corporate resolution** – indicating that the person who signed the acceptance on behalf of the receiving company is an authorized signer

You can send these documents by:

- mail (to the address above)
- fax to (855) 855-0181, or by
- email to service@aclic.com
- [Upload on our website](#) and receive a confirmation email

Although we always reserve the right to request adjustment or additional information, the above items would be sufficient in the majority of the cases.