



Field  
Update



November 14, 2011

## New forms have updated look and are easier to use

In an effort to make it easier to do business with us, several forms have recently been updated to the new standards.

These updates include:

- Each section and required field are clearly marked, ensuring it is filled out completely.
- A number of previous forms have been consolidated into one to help diminish confusion over selecting the correct form.

Our goal is to reduce not-in-good-order requests and improve efficiency and processing time for you and your clients. The new forms are available on your Agent Portal and replace any previous versions as indicated below.

### Forms Available for Use on November 11, 2011

<b>53011</b>	Settlement Option Form (replacing 10444a, 3037, 6411, 12352)
<b>17980</b>	Settlement Option Brochure
<b>16169</b>	Settlement Option Form - Ameritas
<b>16149</b>	Change of Ownership - Ameritas
<b>16283</b>	Request for Co-Ownership (replacing 16284, 16286, and 935NY)
<b>17860</b>	Change of Ownership - Annuities (replacing SF04A053US, SF05E086NY, and BL-087 for annuity contracts)

### Forms Available for Use on November 18, 2011

<b>10054</b>	EFT Authorization for Direct Deposits (ACH Credits) (replacing 5409, 16956, 50276, SF03S003US, and SF05S078NY)
<b>16216</b>	EFT Authorization for Direct Deposits (ACH Credits) - Ameritas
<b>50292</b>	EFT Authorization for Direct Payments (ACH Debits) - Annuity

If you have any questions, please contact Distribution Services at 800-525-7133, option 2.