



Transmittal Notice

Manhattan Life &
Western United Life
Annuities

New Business Administration will include a Transmittal Notice with your client's new annuity contract, if all the requirements have not been completed or need to be revised by you or your client upon delivery of their contract. To better communicate with you regarding your clients' new annuity contract requirements, we've tailored the Transmittal Notice to be specific to the contract to which it is attached.

The Transmittal Notice will list any outstanding requirements and, at the top, will specify the Contract Number and the Due Date by which the listed information needs to be returned. Failure to provide the requested requirements by the Due Date may cause withholding of commissions on future business submitted until the required items are received.

You as a producer are obligated to deliver your client's annuity contract within a reasonable amount of time. We understand that your and your client's time is valuable; therefore, taking the time to review the Transmittal Notice before making the appointment to deliver your client's contract to them will give you a chance to contact the Annuity Operations Office if you have questions regarding any of the items listed on the Transmittal Notice.

The Transmittal Notice will guide you in explaining to your client any missing or incorrect information still needed to complete their annuity contract purchase. Any requirement that requires changes made to documents submitted for an annuity contract must be initialed by the Owner(s) as proof that they understand and acknowledge the changes made.

The contract paperwork will always include a Contract Delivery Receipt that is required to be signed by the Owner(s) and returned to the Home Office as verification that the client received their annuity contract.

Requiring your clients to initial changes to and/or sign documentation, protects both you and the Company in case a complaint is ever made. New Business Administration is always happy to assist you in completing the correct paperwork. Please don't hesitate to call.

Annuity Operations

Direct Mail:
PO Box 2290
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Overnight:
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