

Use latest life new-business and service forms

As of Nov. 23, use new versions of many life insurance new-business and post-issue service forms due to 2017 Commissioners Standard Ordinary (CSO) Mortality Table updates.

New-business form impacts

- Application for Individual Life & Disability Insurance – Part 1 (A2000).
- Application for CareChoice One – Part 1 (A1500) for all states except CA, DC, DE, FL, HI, IN, MT, and NY, which should use the existing version of A1500.
- Long Term Care Insurance Personal Worksheet (FR2118) for all states except CA, DC, DE, FL, HI, IN, MT, and NY, which should use the existing version of FR2118.
- CareChoice One Producer’s Statement (FR2120).
- Life Insurance & Qualified Retirement Plans Disclosure & Acknowledgment (FR2195).
- LTCAccess Rider Outline of Coverage (OALTCR).
- Policy Change Application – Part 1 (A11).
- Service Request (F5341).
- Surrender Request (F6309).
- Temporary Visa Acknowledgment (FR2210).

Impacted packages

- CareChoice One Application Package (A1500P-XX).
- DI New Business Application Package (A2000P(DI)-XX).
- Life/DI New Business Application Package (A2000P-XX).
- Life New Business Application Package (A2000P(LI)-XX).
- Life Policy Change Application Package (A11XX).
- LTCAccess Rider (LTCR) Application Package (LTCR-XX).
- LTCAccess Rider (LTCR) Leave with Client Application Package (LTCR(LC)-XX).

Transition period

Both the old and new versions of these forms will be accepted through year-end. Use only the revised forms for submissions signed on or after Jan. 1, 2020.

Service Request form changes will impact four other post-issue forms.

Service Request form F5341 will be used for all life insurance dividend withdrawals only; changes will require new versions of four other post-issue forms, but updates will reduce not-in-good-order (NIGO) business and assist Smart Forms development.

Use these forms as follows:

- Change Request form (F6070) for all, simple life insurance changes such as changing name, address, and billing frequency.
- Dividend Option Change Request form (F6612) for all life insurance dividend option changes.
- Cancellation of Payment Option form (F5342) for all life insurance and specific payment option cancellations.
- Lapse & Non-Forfeiture Option Change Request form (FR1239) for all life insurance.