

North American Company for Life and Health Insurance® forms information

Annuity allocation forms:

- **North American Charter® Plus series allocation form (25145Z):** Required for all North American Charter Plus sales.
- **NAC BenefitSolutions® series allocation form (25144Z):** Required for all NAC BenefitSolutions sales.
- **NAC IncomeChoice® 7 allocation form (26181Z):** Required for all NAC IncomeChoice sales.
- **Performance Choice® series allocation form (26182Z):** Required for all Performance Choice sales.
- **NAC RetireChoice® series allocation form (25143Z):** Required for all NAC RetireChoice sales.
- **NAC VersaChoiceSM 10 allocation form (26478Z):** Required for all NAC VersaChoice sales.
- **Strategic Design AnnuitySM X allocation form (27999Z):** Required for all Strategic Design Annuity X sales.

Annuity suitability forms:

- **Suitability form (27274Z):** Required for all annuity sales.
- **Comparison of annuity contracts form (26002Z):** Required for all annuity to annuity replacement transactions in all states except Arkansas, Florida, and Nevada.

GLWB (optional guaranteed lifetime withdrawal benefit) rider election forms:

- **Income Pay® Plus election form (24934Z).**
 - In CA, use (24935Z).
 - In NC, use (24934Z-32).
 - In IL, use (24935Z) for NAC RetireChoice; use (24934Z) for Performance Choice 8 and NAC VersaChoice.
 - In PA, use (24934Z) for Performance Choice 8 and NAC VersaChoice.
- **Income Pay® election form – In PA, use (24933Z) for NAC RetireChoice.**

Other/misc. forms:

- **Payout election form (11953Z):** Required for all immediate annuity sales.
- **Gold disclosure (14850Z):** Required for all NAC RetireChoice series sales.
- **S&P 500® Low Volatility Daily Risk Control 5% and S&P 500® Low Volatility Daily Risk Control 8% Index disclosure supplement (22370Z):** Required for all North American Charter Plus series, NAC BenefitSolutions series, NAC IncomeChoice 7, NAC RetireChoice series, Performance Choice series, and NAC VersaChoice sales.
- **S&P Multi-Asset Risk Control 5% Excess Return Index disclosure supplement (26090Z):** Required for all Performance Choice series NAC IncomeChoice 7, NAC Versa Choice, and Strategic Design Annuity X sales.

State-specific information

Alabama:

- **Alabama arbitration agreement (12538Z-01):** Required for all annuity sales.

Arkansas:

- **AR replacement disclosure comparison statement (12339Z-AR):** Required for all replacements.

California:

- **CA elder disclosure (7572Z):** Required if owner or annuitant's age is 65 or older.
- **CA home visit form (9299Z):** Required to be sent to clients age 65 and older prior to first home visit.

Florida:

- **Disclosure and comparison form (25134Z):** Required for all annuity to annuity replacement transactions only.
- **FL suitability questionnaire (21240Z):** Required for all clients.
- **FL accredited investor form (14558Z):** Required for clients age 65 and older for products longer than 10 years and/or surrender charges higher than 10%.
- **Replacement form (6153Z-A):** Required upon client request.
- **Replacement forms (6779Z-FL and 6153Z):** Required for internal replacements.

Kansas:

- **Replacement form (6779Z-KS-A):** Required for internal replacements.
- **Single premium disclosure form (6778Z-KS):** Required for North American Guarantee ChoiceSM, NAC BenefitSolutions, NAC VersaChoice, Strategic Design Annuity X, and NAC FoundationChoice Plus 7 and 10.

Nevada:

- **NV replacement disclosure comparison statement (12339Z-NV) –** Required for all annuity to annuity replacements.

Ohio:

- **Single premium disclosure form (6778Z-OH):** Required for North American Guarantee ChoiceSM, NAC BenefitSolutions, NAC VersaChoice 10, Strategic Design Annuity X, and NAC FoundationChoice Plus 7 and 10.

For more information on product availability in your state, contact Sales Support at **866-322-7066**.

North American fixed index annuities		Multi-year guarantee annuity	
Strategic Design AnnuitySM X	NAC IncomeChoice[®] 7	North American Guarantee ChoiceSM 3	
Standard disclosure form 28501Z	Standard disclosure form 26208Z	Standard disclosure form 26095Z-3	
NAC VersaChoiceSM 10	Performance Choice[®] 8	North American Guarantee ChoiceSM 4	
Standard disclosure form 26434Z	Standard disclosure form 26211Z	Standard disclosure form 26095Z-4	
North American Charter[®] Plus 10	MA 26211Z-20	North American Guarantee ChoiceSM 5	
Standard disclosure form 25260Z	Performance Choice[®] 8 Plus	Standard disclosure form 26095Z-5	
MA 25260Z-20	Standard disclosure form 26212Z	North American Guarantee ChoiceSM 6	
North American Charter[®] Plus 14	MA 26212Z-20	Standard disclosure form 26095Z-6	
Standard disclosure form 25261Z	Performance Choice[®] 12	North American Guarantee ChoiceSM 7	
MA 25261Z-20	Standard disclosure form 26213Z	Standard disclosure form 26095Z-7	
NAC BenefitSolutions[®] 10	MA 26213Z-20	North American Guarantee ChoiceSM 8	
Standard disclosure form 26295Z	SC 26213Z-39	Standard disclosure form 26095Z-8	
MA 25321Z-20	Performance Choice[®] 12 Plus	North American Guarantee ChoiceSM 9	
NAC BenefitSolutions[®] 14	Standard disclosure form 27732Z	Standard disclosure form 26095Z-9	
Standard disclosure form 25322Z	MA 27732Z-20	North American Guarantee ChoiceSM 10	
MA 25322Z-20	SC 27732Z-39	Standard disclosure form 26095Z-10	
NAC RetireChoice[®] 10		North American Guarantee ChoiceSM 11	
Standard disclosure form 26193Z		CA 25230Z	
MA 26193Z-20		Traditional fixed	
PA 26193Z-37		NAC FoundationChoiceSM Plus 7	
NAC RetireChoice[®] 14		Standard disclosure form 24666Z	
Standard disclosure form 25301Z		NAC FoundationChoiceSM Plus 10	
MA 25301Z-20		Standard disclosure form 24667Z	
PA 25301Z-37		Immediate annuity	
		North American Income[®]	
		Disclosures not applicable.	

State replacement notices and applications		
State	Replacement notice	Application
AK	6779Z*	ICC15-22652Z
AL	6779Z*	22652Z-01
AR	6779Z*	ICC15-22652Z
AZ	6779Z*	ICC15-22652Z
CA	6779Z-Z	22652Z
CO	6779Z*	ICC15-22652Z
CT	6779Z*	22652Z-06
DC	6779Z	22652Z
DE	6779Z-DE	22652Z
FL	6779Z-FL	22652Z-09
GA	6779Z	ICC15-22652Z
HI	6779Z*	ICC15-22652Z
IA	6779Z*	ICC15-22652Z
ID	6779Z-ID	ICC15-22652Z
IL	6779Z-IL A&B	ICC15-22652Z
IN	6779Z-IN	ICC15-22652Z
KS	6779Z-KS-B	ICC15-22652Z
KY	6779Z*	ICC15-22652Z
LA	6779Z*	ICC15-22652Z
MA	6779Z-MA	ICC15-22652Z
MD	6779Z*	ICC15-22652Z
ME	6779Z*	ICC15-22652Z
MI	6779Z	ICC15-22652Z
MN	6779Z-MN	ICC15-22652Z
MO	6779Z-NAIC*	ICC15-22652Z
MS	6779Z*	ICC15-22652Z
MT	6779Z*	ICC15-22652Z
NC	6779Z*	ICC15-22652Z
ND	6779Z	22652Z
NE	6779Z*	ICC15-22652Z
NH	6779Z*	ICC15-22652Z
NJ	6779Z*	22652Z
NM	6779Z*	ICC15-22652Z
NV	6779Z-NV	ICC15-22652Z
OH	6779Z*	ICC15-22652Z
OK	6779Z-OK	ICC15-22652Z
OR	6779Z*	ICC15-22652Z
PA	6779Z-PA	22652Z
RI	6779Z	ICC15-22652Z
SC	6779Z*	ICC15-22652Z
SD	6779Z*	22652Z
TN	6779Z-TN	ICC15-22652Z
TX	6779Z*	ICC15-22652Z
UT	6779Z*	ICC15-22652Z
VA	6779Z-NAIC*	ICC15-22652Z
VT	6779Z*	ICC15-22652Z
WA	6779Z-WA*	ICC15-22652Z
WI	6779Z*	ICC15-22652Z
WV	6779Z*	ICC15-22652Z
WY	18270Z-WY	ICC15-22652Z

For more information on product availability in your state, contact Sales Support at **866-322-7066**.

Not FDIC/NCUA Insured	Not A Deposit Of A Bank	Not Bank Guaranteed
May Lose Value	Not Insured By Any Federal Government Agency	