

New business processing year-end guidelines for 2024 production

Target dates to pay cases

Non-underwritten annuity new business

The Home Office must receive all pending, non-underwritten annuity new business applications and all outstanding requirements by the end of business on **Monday, Dec. 16**.

Life policies and underwritten annuities for all companies

- Underwriting must approve the case.
- The Home Office must receive by end of business on **Monday, Dec. 16**, all delivery requirements, fully completed, including but not limited to:
 - o Initial premium
 - o Certificates of Insurability
 - o Bank draft authorization
 - o 1035/Transfer funds received
- Any pending cases with a request for reissue or plan change must be received in the Home Office by end of business on **Monday, Dec. 16**, to ensure processing time for both Underwriting and New Business.

Target date for policy changes of in force policies

Criteria for policy changes

- All policy changes must be received by the Home Office by end of business on **Monday, Dec. 16**.
- Underwriting must approve the changes, when applicable.
- Changes include, but are not limited to:
 - o Conversions
 - o GIO exercises

OneAmerica Financial is the marketing name of the companies of OneAmerica Financial. Products issued and underwritten by the following OneAmerica Financial companies: American United Life Insurance Company[®] (AUL) and The State Life Insurance Company[®] (State Life), Indianapolis, IN.

3942839

For use with financial professionals only. Not for public distribution.

[OneAmerica.com](https://www.OneAmerica.com)

Processing options

For fastest processing, upload additional requirements via OneSource Online submission.

Fax	Regular mail	Overnight delivery for life insurance and annuity business
Annuity: 317-285-1529	<i>Be sure to use the following envelopes:</i> AUL Annuity: 7-18194	The companies of OneAmerica Financial <i>Attn: Individual Life New Business</i>
Life: 317-285-2137	AUL Life Insurance: 7-18194	-OR-
Care Solutions: 317-285-5115	State Life Care Solutions: I-18792	<i>Attn: Annuity New Business</i> 250 W. North St. Indianapolis, IN 46202

OneAmerica Financial is the marketing name of the companies of OneAmerica Financial. Products issued and underwritten by the following OneAmerica Financial companies: American United Life Insurance Company® (AUL) and The State Life Insurance Company® (State Life), Indianapolis, IN.

3942839