

American General Life Insurance Company (AGL)

Income Annuity Trustee Transfer Request

Use this form for all qualified plan transfers or direct rollovers.

Instructions for Releasing Financial Institution

Liquidate All Part \$ _____ or _____%

(check one) **GROSS** **NET** (of charges and fees) of my account balance.

Name of Current Company/Trustee/Custodian (required) _____

Owner(s) (required) _____

Owner's Email Address is Required (If none exists, enter NA) _____

Street Address to Send Exchange/Transfer Request _____

City _____ State _____ Zip _____ SSN(s) (required) _____

Annuitant(s)/Insured (required) _____ Phone _____

Policy/Contract/Account Number(s) (required) _____

Questions about this request? Call Annuity Service Center at: 1 (800) 975-7978 option 1, then option 4.

Checks should be made payable to American General Life Insurance Company, FBO the Owner, and

contract number _____.

SPIA#

Regular Mail:

American General Life Insurance Company
PO Box 650545, Dept AGL
Dallas TX 75265-0545

Overnight/Express Mail:

JPMorgan Chase (TX1-0029)
ATTN: AGL 650545, Dept AGL
14800 Frye Road, 2nd Floor
Ft Worth TX 76155

Trustee-to-Trustee Transfer (Qualified plan transfer, nonqualified transfers or direct rollovers)

I hereby authorize my current trustee/custodian to liquidate and transfer the assets from the above named account to AGL: This amount represents all or part of my eligible rollover distribution as defined under 405(c)(8)(B). I realize that I will receive an IRS Form 1099R on this distribution from my plan. These funds will be accepted by AGL which will issue to the Owner an Individual Retirement Annuity (IRA), as defined under section 408(b) of the IRC, unless otherwise indicated. I understand the exact amount of the proceeds may vary depending upon the date of transfer and I agree to timely execute any additional documents required to complete the transfer.

Type of assets to be transferred Qualified Retirement Plan 403(b) IRA Roth IRA
 Nonqualified CD or other savings Other _____

Required Minimum Distribution Information

I understand that annuities purchased with IRA or Qualified Plan funds are subject to the Minimum Distribution Rules. If this is a complete transfer and you are of an age that requires taking Required Minimum Distributions (RMD), you may be required to take an RMD prior to completing this transaction. Please visit www.IRS.gov for more information about when you must begin taking RMDs.

Signatures

Owner _____

Date _____

Joint Owner (if applicable) _____

Date _____

Letter of Acceptance

The above named individual has established a Qualified Income Annuity with AGL. We will accept the proceeds currently held by your company for placement in the income annuity established with AGL.

By _____
Authorized Representative of AGL

Date _____

60-Day Payout Rate Lock Authorization

The 60-Day payout rate lock is available for income annuity cases (limited up to \$1,000,000 of premium) involving 1035 Exchanges or Trustee-to-Trustee transfers. If the payout rate lock is selected, the payout rates used for determining annuity payments will be locked for 60 calendar days from the date the application paperwork was signed, regardless of the current payout rates (whether higher or lower) in effect at the time the funds are received by AGL. If the rate lock is not selected, the payout rates used to determine annuity payments will be the payout rates in effect at the time the funds are received by AGL. In the case of multiple exchanges/transfers, the payout rates used will be the ones in effect at the time the last transfer is received by AGL. In the event the transfer of funds takes longer than 60 calendar days, the rate lock will expire and the payout rate will be the current rate at the time all transfers are received by AGL.

If no selection is made, you will be deemed to have checked the "No" box below, and AGL will use the payout rates in effect at the time all funds are received from the current trustee/custodian.

The payout rates are based upon the quote provided with the completed Single Premium Income Annuity Application. If for some reason the quote provided is invalid or expired when received by AGL, a new quote will be generated at that time and that quote date will be the first day of the new 60 day period.

<p>If transfer is for \$1 million or less, select an option by checking the appropriate box.</p> <p><input type="checkbox"/> Yes, lock the current payout rates available at the time the application paperwork was signed. I understand the payout rate lock expires in 60 calendar days.</p> <p><input type="checkbox"/> No, do not lock the current payout rates, instead use the payout rates available at the time all funds are received by AGL.</p>

AGL will diligently seek payment of funds during the 60 day period. In the event AGL finds payment of the funds is being delayed as a result of actions on your part, or the part of any person or entity directly or indirectly under your control, the 60 Day payout rate lock will be deemed to have expired, and AGL will use the payout rate available at the time all funds are received by AGL.

I understand that my selection above is irrevocable once the Exchange/Transfer request is completed and signed.

Owner's Signature _____ Date _____

Agent's Signature _____ Date _____