

# Life Insurance and Annuities Replacement Memorandum

**American General Life Insurance Company, 2727-A Allen Parkway, Houston, TX 77019**

**LIFE INSURANCE AND ANNUITIES  
EXISTING CONTRACT/POLICY**

**REPLACEMENT MEMORANDUM  
PROPOSED CONTRACT/POLICY**

\_\_\_\_\_  
Owner / Annuitant(s)

\_\_\_\_\_  
Owner / Annuitant(s)

\_\_\_\_\_  
Insurer

\_\_\_\_\_  
Insurer

\_\_\_\_\_  
Contract #

\_\_\_\_\_  
Application #

\_\_\_\_\_  
Product Type \*

\_\_\_\_\_  
Product Type \*

\_\_\_\_\_  
Product Name

\_\_\_\_\_  
Product Name

**FOR BOTH LIFE INSURANCE AND ANNUITIES  
(Complete all that is applicable)**

CONTRACT OR POLICY PROVISION	EXISTING CONTRACT/POLICY	REPLACEMENT CONTRACT/POLICY
Current Proposed Premium / Annual Consideration		
Current Contract Value		
Current Surrender Value		
Death Benefit Amount		
Current Interest Rate & Guarantee Period		
Guaranteed Minimum Accumulation/ Interest Rate		

\* Deferred Fixed Annuity, Deferred Variable Annuity, Deferred Indexed Fixed Annuity, Immediate Annuity, Indexed Life Insurance, Variable Life Insurance, Whole Life Insurance, Universal Life insurance, Term Life Insurance and Endowment



Surrender Charge Period in Years/ Charge Percentage Per Year/ Years Remaining		
Are free withdrawals available? If yes, what percentage? List options.		
Other significant policy or contract provisions		

**FOR ANNUITIES ONLY**  
(Complete all that is applicable)

<b>CONTRACT PROVISION</b>	<b>EXISTING CONTRACT/POLICY</b>	<b>REPLACEMENT CONTRACT/POLICY</b>
Initial Bonus Percentage or Amount		
Potential Loss of Bonus if Annuity is Exchanged, Surrendered or Funds Withdrawn		
Sub-Account Choices		
Guaranteed Purchase/Settlement Options		

I have received a copy of this completed form.

**Owner/Annuitant Signature**

\_\_\_\_\_

**Owner/Annuitant signed on (date)** \_\_\_\_\_

**Joint Owner/Annuitant Signature**

\_\_\_\_\_

**Joint Owner/Annuitant signed on (date)** \_\_\_\_\_

I certify that the above provisions, and any other significant provisions, of the existing policy or contract and the proposed policy or contract were discussed with the applicant(s).

**Producer Signature**

\_\_\_\_\_

**Producer signed on (date)** \_\_\_\_\_

