

Annuities (2021)

Annuities Interrogatories

	Yes No Response	Explanation
01 Individual Indexed Fixed Annuities - Does the company have data to report for this product type?	_____	_____
02 Individual Other Fixed Annuities - Does the company have data to report for this product type?	_____	_____
03 Individual Indexed Variable Annuities - Does the company have data to report for this product type?	_____	_____
04 Individual Other Variable Annuities - Does the company have data to report for this product type?	_____	_____
05 Is there a reason that the reported Individual (Indexed or Other) Fixed Annuities information may identify the company as an outlier or be substantially different from previously reported data (such as assuming, selling or closing blocks of business; shifting market strategies; underwriting changes, etc)?	_____	_____
06 If yes, add additional comments.	_____	
07 Is there a reason that the reported Individual Variable (Indexed or Other) Annuities information may identify the company as an outlier or be substantially different from previously reported data (such as assuming, selling or closing blocks of business; shifting market strategies; underwriting changes, etc)?	_____	_____
08 If yes, add additional comments.	_____	
09 Does the company use third party administrators (TPAs) for purposes of supporting the individual annuity business being reported?	_____	_____
10 If yes, provide the names and functions of each TPA.	_____	
11 Additional state specific Individual Fixed Annuities comments (optional):	_____	
12 Additional state specific Individual Variable Annuities comments (optional):	_____	

Annuities

	Individual Indexed Fixed Annuities	Individual Other Fixed Annuities	Individual Indexed Variable Annuities	Individual Other Variable Annuities
13 Number of replacement contracts issued during the period.				
14 Number of internal replacement contracts issued during the period.				
15 Number of external replacements of unaffiliated company contracts issued during the period.				
16 Number of external replacements of affiliated company contracts issued during the period.				
17 Number of contracts replaced where age of annuitant at replacement was < 65.				
18 Number of contracts replaced where age of annuitant at replacement was 65 to 80.				
19 Number of contracts replaced where age of annuitant at replacement was > 80.				
20 Number of new immediate contracts issued during the period.				
21 Number of new deferred contracts issued during the period where age of annuitant was < 65.				
22 Number of new deferred contracts issued during the period where age of annuitant was 65 to 80.				

Annuities

	Individual Indexed Fixed Annuities	Individual Other Fixed Annuities	Individual Indexed Variable Annuities	Individual Other Variable Annuities
23				
24				
25				
26				
27	Number of contracts surrendered between 6 years and 10 years of policy issue.			
28				
29				
30				
31				
32				
33				
34				
35				
36				
37				
38				
39				
40				

Annuities Attestation

	First Name	Middle Name	Last Name	Suffix	Title	Comments
41	First Attestor Information					
42	Second Attestor Information					
43	Overall Comments for the Filing Period					