



The US Department of Labor (DOL) has expanded its interpretation of the definition of “investment advice fiduciary” to include certain rollover recommendations, including ERISA plan-to-IRA rollovers and IRA-to-IRA transfers. Beginning February 1, 2022, financial professionals who provide fiduciary investment advice in connection with the sale of an American Life & Security Corp. annuity are expected to comply with Prohibited Transaction Exemption 84-24.

To assist in compliance, American Life has updated our Annuity Suitability Form. We also have created a PTE 84-24 disclosure form for your use that will generate in Firelight if the annuity application is a qualified plan type. The disclosure form will be part of the e-signing process. However, a copy of this form will not transmit to American Life in the Firelight packet. The form is for your and your clients’ records only. These forms will be effective February 1, 2022.

We appreciate your business and value our relationship. If you have any questions, please do not hesitate to contact us at customerservice@american-life.com or 1-800-715-1458

Thank You
American Life and Security Corp

[Prohibited Transaction Form](#)

American Life and Security Corp