Establish an IRA annuity for your clients with three easy steps

With Annuity Investors Life Insurance Company®, setting up an IRA annuity for your clients is as easy as 1-2-3!

Payroll deduct IRA

Available for traditional, Roth and SIMPLE IRAs.

These are established through the employer, who determines the contribution dates.
Here are some tips to ensure smooth processing:

1. The employer should complete the Employer Information Form and fax to our group setup department at (513) 357.3310.
2. If it's a traditional or Roth IRA, the employee needs to sign a Salary Reduction Agreement with the employer. If it's a SIMPLE IRA, the employer should make sure it has adopted a SIMPLE IRA plan (using IRS Form 5305-SIMPLE) and has given the required notices to employees. These notices must include SIMPLE information from Annuity Investors Life Insurance Company®. The employee then needs to sign a SIMPLE IRA Salary Reduction Agreement with the employer.
3. Select the product that best meets the client's individual needs, and submit the application as you normally would.

! **Note:** We have the option for funds to be wired to us. The employer needs to select this option on the Employer Information Form. Upon selection, we will send instructions to the employer for wire deposits.

Bank draft IRA

Available for traditional and Roth IRAs.

An individual can set up a bank draft IRA directly with us. To avoid not in good order issues:

1. Select the product that best meets your client's individual needs, and submit the application as you normally would.
2. Don't forget the Bank Draft Form and a voided check. If funds are coming from a business account, we need a letter from the authorized signer of the account stating what the funds are being used for. Note that the Bank Draft Form must be signed by the person whose name is on the account.
3. We can only draft on a monthly basis. The client needs to specify the exact day of the month to draft funds.

! **Note:** We can set up the draft to come from a savings account. If a savings account is selected, validation that the account is established is required. A deposit slip works best for this method.

That's all there is to it! Contact your Annuity Investors Life Insurance Company® Direct Connect Team representative at **DirectConnectTeam@gaig.com** or (800) 438.3398, ext. 17197 for questions and product support, or visit **www.Write403bDirect.com** to get started.

GREAT AMERICAN® INSURANCE GROUP
Annuity Investors Life