

Virtus Protection IUL

Transition Rules

Important dates

First application date: 08/05/2024

First issue date: 08/05/2024

First commission pay date: 08/12/2024

Transition rules

1. Policies that are issued and paid for will not be reissued.
2. Any issued, but not paid for, life insurance policy is eligible to be reissued as long as the original application is not dated prior to 02/05/2024. To apply for reissue, the following items are required:
 - a. A letter or Request for Life Policy Change (see form numbers below) requesting the change
 - b. The first modal premium
 - c. The previously issued policy
 - d. Application supplement with premium allocation options (Form ICC19-6458 or 19-6458)
 - e. If the application included a 1035 exchange of an existing policy, a new 1035 Exchange - Policy Exchange Agreement (Form 9234) will be required.Upon reissue, your client's policy will include a policy amendment for your client to sign and date that changes the plan being issued. This amendment is an additional delivery requirement that must be returned to the home office.
3. Beginning immediately, you may notify Underwriting of your client's interest in having his/her pending life insurance application changed to the new plan as long as the application is dated on or after 02/05/2024. Make sure your client completes all of the required forms shown above.

Upon issue, your client's policy will include a policy amendment for your client to sign and date, which changes the plan being issued. This amendment is an additional delivery requirement that must be returned to the home office.
4. If the policy is being issued as other than originally applied for, a revised illustration conforming to the policy being delivered to the client will also be needed as a delivery requirement.
5. If you submitted any state-required forms, you will need to submit new state-required forms prior to issue/reissue. This includes replacement forms that compare the policy being replaced with the new Virtus Protection IUL policy.

Request for Life Policy Change form numbers: 18-3023-DC-IUL.CF (DC), 18-3023-FL-IUL.CF (FL), 18-3023-IUL.CF (CA, DE, ND, SD) and ICC18-3023-IUL.CF (All other states)

Indexed universal life insurance is issued by AuguStarSM Life Assurance Corporation. Guarantees based on the claims-paying ability of the issuer. Product, product features and rider availability vary by state. Issuer not licensed to conduct business in NY.

Indexed universal life issuer:

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