

Important Announcement From Americo

June 18, 2019

TO: Americo Agents in CA

Sales to Seniors Over 65

The appropriate sale of our products is something that Americo takes seriously. As an agent, it is your responsibility to carefully consider the suitability of each sale you make. Additionally, in California, for sales to consumers over age 65, when you are meeting in their home and a prior relationship does not exist, the Sale of Life Insurance and Annuities in California form (03-185-1-CA) is required to be completed no less than 24 hours and no more than 14 days prior to meeting. This form is required to be completed and kept for your records. While you are not required to send a copy to Americo, it is expected by Americo that you will produce a copy of this form upon reasonable request for purposes of any audit or examination.

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