

Field Update



September 1, 2011

New and Updated Service Forms Now Available

At Aviva, we realize the importance to both you and your clients of ensuring that all policy information is accurate and up-to-date. Effective September 1, 2011, you can use our revised and consolidated service forms. We have made these updates in an effort to expedite the process and make it more user-friendly. The following changes have been implemented:

- Trust Verification (16541) was updated and replaces 1067NY
- Special 403(b) Tax Notice Regarding Plan (10056) was updated and replaces 70331
- Affidavit of Attorney-in-Fact (16747) was updated and replaces SF05E085NY and SF04E026US
- Trustee Verification and Release (For Claims Use Only) (80126) was updated and replaces 16680
- Pension Plan Verification (17982) is a new form which helps collect information about plans

These new and updated service forms are now available on Aviva Live. We encourage you to discard the replaced forms, and begin using the new forms no later than September 30, 2011.

We thank you for your continued business!

If you have any questions, please contact Sales Support at (800) 255-2405, ext. 6620.

The image displays five Aviva service forms arranged in a collage. Each form includes the Aviva logo and contact information for Aviva Life and Annuity Company. The forms are:

- Pension Plan Verification (17982):** A form for verifying pension plan information, including fields for plan name, identification number, and administrator details.
- Trust Verification (16541):** A form for verifying trust information, including contact details for the trustee and beneficiary, and a section for state governance.
- Affidavit of Attorney-in-Fact (16747):** A form for verifying the identity and authority of an attorney-in-fact, including personal and contact information.
- Special 403(b) Tax Notice Regarding Plan (10056):** A form providing tax notice regarding a 403(b) plan, including a summary of the plan and instructions for the participant.
- Trustee Verification and Release (For Claims Use Only) (80126):** A form for verifying trustee information and providing a release, including instructions for the trustee and beneficiary.