

Stonebridge Life - Steps to Set Up Allotments

In order to successfully issue new business applications with Stonebridge Life, it is important to follow the correct steps in order to set up the corresponding allotments. The following steps will assist you when submitting new business with Stonebridge, and when setting up the allotments:

- 1) Submit the life application to New Business at **1.866.297.3607**. Only products with a level billing premium are suitable for Federal Salary Allotments.
- 2) Complete the appropriate allotment form:
 - A. **1199A - Federal Direct Deposit Form**, or **PS1199A - Postal Employee Direct Deposit Form**
 - B. Complete name, address, SS#, federal agency name and address, and the amount of the **per pay period** allotment, rounded up to the nearest whole dollar. The individual's "Depositor Account Number / Employees' Account Number" is a preprinted number. The employee's social security number should complete the "Depositor Account Number / Employees' Account Number" field.
 - C. It is the responsibility of the employee to submit one copy to their payroll office. This can also be done online. Please contact Elaine Brown for a list of websites for all federal agency payroll offices.
- 3) Complete a **Bank Authorization Letter**. Please contact Elaine Brown for a copy of this form.
- 4) One copy of the 1199 form and Bank Authorization Letter **must be faxed to Bank of America / Government Allotment Services at 1.888.858.4416**.
- 5) Include a copy of the 1199 form and Bank Authorization Letter with all application paperwork to send to New Business at **1.866.297.3607**.

Please note that the allotment will not be successfully set up until a copy of the 1199 form and the Bank Authorization Letter are sent to BOTH Stonebridge Life and Bank of America. For additional information, form requests, or any questions, please contact Elaine Brown.

Madison National Life Contracting Opportunities / Products

Are you contracted with Madison National Life? If not, please contact Elaine Brown for contracting information.

Madison National Life - Secure Advantage

- ★ Current Interest Rate 5%
- ★ Permanent Whole Life Protection
- ★ Builds Cash Values
- ★ Tax Deferred Annuity Rider
- ★ 3% Guaranteed Minimum for Life of the Policy



Madison National Life - AssetShield

- ★ Current Interest Rate 5%
- ★ Flexible Premium Deferred Annuity Roth IRA
- ★ Tax Free Interest
- ★ Withdrawal of up to 10% of accumulated account balance at no charge
- ★ 3% Minimum Guaranteed Interest Rate



Focusing on our IHC Financial Agents

IHC Financial Group appreciates our agents! Every edition of *IHC Financial Focus* will contain a section featured on one of our agents. This month's edition is featuring Monica Dove of New Orleans, Louisiana. Monica has been working in the insurance business about five years, and her favorite product is the Madison National Life AssetShield.

In her free time, Monica enjoys staying active, running, exercising, and going to the gym. She was born and raised in New Orleans, Louisiana; however, she did live in Texas for 11 years. Monica is an avid sports fan, and ran track and played collegiate basketball for Tulane University! Go Wave!

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ANICO Webinar Thursday, September 10th

We will be hosting a webinar for American National Insurance Company (**ANICO**) products on Thursday, September 10, 2009, at **10:30 a.m., CST**. Please contact Elaine Brown for more information on how to register for the webinar.

New Contracting Opportunities

IHC Financial Group currently works with the following companies:

- Allianz • American Equity • ANICO • Assurity Life • Aviva • Genworth • Great American • ING • Stonebridge Life • Transamerica

Please contact us for contracting information on any of the aforementioned companies, or for a copy of our IHC Financial Group Product Portfolio.

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