

Carrier	Notes	Contact information	Website	Online Instructions
American Equity	Value info-client needs to call in	Phone #: 866-233-6660 NY business x1485	N/A	No online access
	Surrender forms are policy specific & mailed only to Policyowner, need to call to request	Fax to: 515-221-0490		
American General	General Service	Phone #: 877-200-0220 #5	http://estation.americangeneral.com	Login; Go to Inforce tab; Go to Inforce Lookup
	Payment can be called in, made online or mailed to: American General Life Ins PO Box 0798 Carol Stream, IL 60132-0798	Phone #: 800-231-3655		
	Policy Changes	Email: agla.scan.center@aig.com Fax 844-930-0370		
	Collateral Assignments	Fax to: 713-831-3028		
AIG Annuity/First Sun America/Western National Life		Phone # 888-438-6933	N/A	No online access
American National	All life requests	Phone #: 888-501-4043 #8 Fax to: 409-621-7505	www.anico.com	No online access
	Annuity Requests	Fax to: 409-766-2022		
American Progressive	Service requests	Fax to: 850-438-8478	N/A	No online access
Ameritas/Union Central	Address change can be called in by owner/agent	Phone #: 800-319-6901	https://service.ameritas.com/service/login.asp	Login; Go to Individual/RP Accounts; Client/Contract; Search Criteria
	All policy service requests can be faxed or emailed	clientservice@ameritas.com Fax to: 402-467-7335		
Athene/Aviva/Bankers	General Service	Phone #: 877-462-8992 (policies beginning with BL, IL, AD or OO) or email to: askcustomerservice@gafg.com	www.athene.com	No online access
	Change of address/bene/owner/EFT/reinstatement/full annuity surrender/release of information requests	Fax to: 800-531-0038		
	Inforce illustrations - MUST ask for them as ran originally if 20 pay, etc or they will run life time			
	Partial Withdrawals	Fax to: 800-875-0223		
Athene/Presidential/ Athene of NY	General service	Phone #: 800-926-7599		
	Change of bank requests Partial withdrawals Authorization to Release Information Beneficiary Request	Fax to: 855-893-5664		
	LIFE: Change of address/bene/owner/EFT/reinstatement	Fax to: 845-704-1361		
AXA	General Service	Phone #: 800-777-6510	www.axa-equitable.com	Login; In-Force; Policy Number, Go to SEARCH
	Collateral Assignments	Fax to: 855-268-6378 Attn: Service Dept.		
	Change of servicing agent - letter of instruction from policy owner	Fax to: 855-277-6124 Attn: Commissions		
Banner	Change of address/owner/bene/collateral assignments/reinstatements	Phone #: 800-638-8428 Fax to: 301-294-6960	www.lgamerica.com	Login under For Professionals; Go under My Business; select Inforce; Search policy number
Berkshire/Guard.	General Service *Change of servicing agent-needs letter of instruction DI POS Request Email	Phone #: 800-819-2468 Fax to: 413-395-5992 ATTN: POS diprocessing@glic.com	http://forms.berkshirelife.com	No online access

Columbian Mutual	General Service	Phone #: 888-776-5429	www.cfglife.com	No online access
	Change of servicing agent-needs letter of instruction, agent must be licensed	Fax: 607-724-1599		
	Change of bank requests	Fax: 345-475-6612		
Companion	Collateral Assignment/ and all service requests	Phone #: 800-733-0662 Fax to: 402-997-1906 ATTN: IPS Dept.	N/A	No online access
Fidelity & Guaranty Life/OM	General Service	Phone #: 888-513-8797	N/A	No online access
	Most POS requests, including change of servicing agent (letter of instruction from policy owner, agt must be licensed)/Change of address/partial withdrawal	Fax: 402-328-2266		
	Full surrender requests NY policies	Fax to: 402-328-2258		
	TSA annuities	Fax to: 402-328-4024		
First Great West (Canada Life)	General Service	Fax to: 303-801-5335		
First Sun(Western National)/US Life	Withdrawal Requests	Fax to: 806-342-1703	N/A	No online access
First United American	General Service	Phone #: 800-331-2512	www.firstunitedamerican.com	No online access
	Annuity service	Phone #: 800-585-9739		
	Change of Bene for Annuities	Fax to: 972-569-3698 or email to: annuityservicedesk@torchmarkcorp.com		
Genworth Life Insurance Company of NY	General Service	Call: 888-325-5433 email: lifecustomerservice.com	www.genworth.com/pro/producer-login.html	
	Rate Reconsideration	Fax to: 877-300-1280		
	Change of servicing agent - letter of instruction from policy owner, agent must be contracted	Fax to: 434-948-5965 ATTN: Licensing		
	Policy Information	on website		
	Change of address/bene/owner/EFT/surrender	Fax to: 877-300-1280		
Hartford Life	Service for Individual Life	Phone #: 800-243-5433		
ING/RELIASTAR/VOYA	General Service - Release of Info Requests/change of owner/EFT/Partial withdrawal/policy service request	Phone #: 877-882-5050 Fax to: 877-788-6305	www.professionals.voya.com	Visit the website for policy information
	Change of BENE	Fax to: 877-788-6308		
John Hancock	Change of Servicing Agent	Phone #: 888-267-7781 Fax to: 416-963-7323	N/A	No online access
	Change of owner/ bene/ EFT/release of info/most policy service requests	Fax to: 617-572-1571		

John Hancock LTC	General Service	Phone # 800-377-7311	N/A	No online access
Liberty Mutual	General Service Collateral Assignment	Phone #: 800-400-1377 Fax to: 603-749-9759	N/A	No online access
Lincoln Life	General Service	Phone #: 888-946-2700	www.lfd.com	Login; Scroll down to bottom of page; Go to Advisor Name; Select Account Number; Insert Number
	Change of Servicing Agent	Policyowner calls to request form		
	Policy Information	Can be Accessed on Company Website		
	Change of owner/bene/release of records for LIFE	Fax to: 800-819-1987		
	Payments can be called in or mailed to:	PO Box 7247-0453 Philly, PA 19170		
	Change of owner/bene for Annuity	Fax to: 260-455-6310		
	Change of address for LIFE	Fax to: 603-226-5985		
Manhattan Life	Release of Info Requests/ and other policy service requests:	Fax to: 713-583-3253 Attn: Policy owner services	N/A	No online access
Mass Mutual	General Service	Phone #: 800-272-2216	www.fieldnet3.massmutual.com	No online access
	Change of servicing agent/ Letter of instruction signed dated by owner. Must be licensed w Mass	Fax to: 866-329-4257		
	Change of owner/bene for Life	Fax to: 866-329-4527 Attn: Life HUB		
	Change of owner/bene/Partial Withdrawals (under 25k) for Annuities	Fax to: 866-329-4272		
MetLife/Brighthouse	General Service	Phone #: 866-638-0311	www.brighthousefinancialpro.com	Existing business/Account servicing
	Partial withdrawal for annuities:	Fax to: 401-827-2225		
	Change of Bene/owner:	Fax to: 401-827-2771		
	Change of address:	client can call in and change 877-638-0411		
	Change of Servicing agent. Form & Letter of instruction signed/dated by owner. Must be licensed by Met	Call MET for fax # depends on policy #		
	General fax for Life reinstatements	Fax: 908-655-9575 Email: reinstatements@metlife.com (10 biz days)		
	Rate Reconsideration/Reinstatement	Fax to: 908-552-3794		
	Inforce Ledger Requests	Email: ILIS@metlife.com		
	Payments** can be made online at www.metlife.com/quickpay	Reg Mail: Melife PO Box 371310 Pittsburgh, PA 15250 Overnight: Metlife Mellon Client Service Center AIM #1540470 Lockbox 371487 500 Ross Street Pittsburg, PA 15262		
	MetLife of CT (Travelers)	General Service		
Policy Information	Need Call Company-No Web Access			
Change of Bene/owner for Life	Fax to: 908-655-9573			

MedAmerica	General Service	Phone #: 800-544-0327	www.medamericaltc.com	No online access
	Change of Address	Client need call OR put in writing.		
	Change of info for LTC:	Fax to: 800-963-4038		
MONY Life	General Service	Phone #: 800-333-3418 #7676	N/A	No online access
	*Payments are MAIL IN ONLY (policy number on check)	Reg mail: PO BOX 4830 Syracuse, NY 13214 Overnight: 5788 Widewaters Parkway Second Floor Syracuse, NY 13214		
National Integrity	General Service	Phone #: 800-900-6460	www.integritycompanies.com	No online access
	Change of Servicing Agent	Letter of Instruction Signed/Dated by Owner. New Agent Must Be Licensed W/NI		
	Partial withdrawals/change of owner/bene:	Fax to: 888-220-2677 (can't fax death claims or full surrenders)		
National Life Ins. Co.	General Service	Phone #: 800-732-8939		
	Change of Bene	Fax to: 802-229-3868		
	Change of servicing agent	Call for form		
Nationwide	General Service	Phone #: 800-848-6331	www.nationwide.com/subsites/ssclogin.jsp	No online access
	Authorization to release info	Fax to: 888-677-7393		
Penn Mutual	General Service (press 0 for service rep)	Phone #: 800-523-0650	www.pennmutual.com	No online access
	Collateral Assignments; Authorization for DD	Fax to: 215-956-76999(service dept.)		
	Change of owner/partial withdrawal	Fax to: 866-322-7071		
	Address change	call: 800-523-0650		
Petersen Internat'l.	General Service	Phone #: 800-345-8816	N/A	No online access
	All Requests	Email to Robin@piu.org		
	Change of Address-owner must request in writing or email			
Principal	LIFE: General Service	Phone #: 800-247-9988	www.principal.com/eFP	Login; Go to Existing Business; Select Customer Information; Customer Information Search; Choose Desired Option
	Change of Address	Can be changed over the phone: 800-654-4278 option 4		
	Change of servicing agent	Attn: Individual Support team Fax to: 866-321-1474		
	DI Rate Reduction Request	Fax to: 866-317-0986		
	Change of owner/bene	Fax to: 800-255-6609 Fax to: 866-885-0390		
	Annuities: General Service - Deferred General Service - SPIA/DIA Change of bank requests/collateral assignments & change of bene/owner	Phone #: 800-852-4450 Phone #: 866-321-9648 Fax to: 866-894-2087		
	Payments can be called in or mailed to:	PO Box 10360 Des Moines, Iowa 50306-0360		
Protective	General Service	Phone # 800-866-9933 #5	www.myprotective.com	Login; Existing Business; Search By Policy/Contract Number; Search
	Release of Info Requests; all life requests	Fax to 205-268-3402; Beneficiary Changes fax# 205-268-3684		
	Policy Information	Can be Accessed on Company Website		
	Systematic & partial withdrawals	Fax to: 866-894-2087		
	Change of Servicing agent. Letter of instruction signed/dated by owner.			

Prudential	General Service	Phone #: 800-782-5356	www.pruxpress.com	Login; Go to Inforce Service; Choose Inforce Policies; Launch Account Access; Policy Search
	Release of Info Requests/change of owner/bene/EFT/address(address change must be signed by owner or trustee Life policies	Fax to: 215-784-3624 if busy try 855-807-7759		
	Collateral assignment forms & rate reconsiderations	Call 800-782-5356 ask for settlem't options fax 215-784-3624 or 855-807-7759 Attn: Settlement Options		
	Change of owner/bene/partial withdrawals- Annuities	Fax to: 800-576-1217		
	Change of servicing agent. Letter of instruction	Fax to:800-875-5965 Attn: Service agent change		
Reliastar - See ING				
Security Mutual	General Service	Phone #: 800-765-6668	www.smlnyagent.com	Login; Go to Security Link; Policy Center; Policy Search; Choose SML as Select Company; Enter Policy Number to Search
	ALL REQUESTS	Require Original Signature(s)		
	Policy Information	Can be Accessed on Company Website		
	Release of info	fax to: 607-722-0598		
	Change of servicing agent	Fax to:607-773-2007		
Transamerica	General Service	Phone #: 800-295-3990	www.tatransact.com	Login; Go to Inforce Status; Enter Policy Number to Search
	Rate Reconsideration	Fax to: 866-622-5051		
	Policy Information	Can be Accessed on Company Website		
	Change of Servicing Agent	Owner Letter of Instruction-Fax to 866-622-5051, Attn: Customer Svc.		
Union Central-See Ameritas				
UNUM/Paul Revere	General Service	Phone #: 800-633-7490	www.unum.com	No online access
	Change of Servicing Agent - Letter of Instruction Signed/Dated by Owner. New Agent Must Be Licensed.	Fax to 774-437-4126, ATTN: POS		
US Life	General Service	Phone #: 877-200-0220 #5	http://econnections.aigag.com	Unable to access at this time
	Partial Withdrawals --	Fax to: 713-620-3829		
	Policy Information	Can be Accessed on Company Website		
	Collateral Assignment	Fax to: 713-831-3028		
	Annuity Bene Changes			
Vantis	General Service	Phone #: 866-826-8471, #2	www.goagentweb.com	No online access
	Policy service requests	Fax: 860-298-5483		
VOYA - See ING				
William Penn Association	General Service	Phone # 800-848-7366	N/A	No online access
	Payments mailed to:	709 Brighton Rd. Pittsburgh, PA 15233-1821		
	Need Original Request To Surrender Policy			
	Partial Withdraw	Fax to: 412-231-8535		

William Penn	General Service	Phone #:800-346-4773, opt 1,5,4	www.lgamerica.com	Login under For Professionals; Go under My Business; select Inforce; Search policy number
	For Claims	fax to: 516-229-3081 email to: customerservice@wpenn.com		
	Collateral Assignments Release of Collateral Assignments (need letter of instruction on company or bank letterhead and officer w title) Reinstatement Requests Partial Withdrawals	Fax to: 516-229-3081		
	Policy info	Available on the website		
	Change of Servicing Agent Full surrender forms and letter of instruction	Fax to: 516-229-3081		
	*Payments can be mailed to: Other option is to go online www.lgamerica.com -Customer Services -Policy holder services -New registration -Dup UL policies cost \$25	Regular mail (Bills) : William Penn PO BOX 740527 Atlanta, GA 30374 Home office address (if late)& Overnight William Penn 3275 Bennett Creek Avenue Frederick, MD 21704		
	Wilton Reassurance	Change of owner/bene for life and annuities Change of servicing agent *Partial Withdrawals *Release of Info requests *to cancel life insurance – letter of instruction, signed/dated by owner. Also, can request refund of unearned premium.		