

American Equity Lock Guidelines

For your client to qualify for the current rate, applications along with cash or 1035/Direct Transfer paperwork must be received in their office by 5:00 CST the day prior to the rate change. Transfer funds must be received by 5:00 p.m. CST the same day of the rate change in the following month. (For example, if the rate change occurs on February 7, the funds must be received by March 7.)