



Ages 80 & Older Suitability Acknowledgement

AMERICAN SAVINGS LIFE INSURANCE COMPANY

935 E. Main Street, Mesa, Arizona 85203-8849

(480) 835-5000 | (800) 880-2112

www.AmericanSavingsLife.com

SENIOR SUITABILITY ACKNOWLEDGEMENT BY A TRUSTED INDIVIDUAL

(Complete either Box 1 or Box 2)

I, _____ (Name of Acknowledging Individual),
am the _____ (Relationship to Annuity Applicant)
of _____ (Name of Annuity Applicant).

SELECT ONE:

☐ I was present during the annuity sales presentation provided by _____
_____ (name of Agent/Financial Advisor), in which we discussed the terms of the annuity,
including any surrender charges for early cancellation by the Annuitant or by Beneficiaries, and I believe
that this annuity product is suitable for the Applicant.

OR

☐ I was not present during the annuity sales presentation but acknowledge that the Applicant is of sound
mind and capable of making sound financial decisions and I understand that the Applicant, together with
the agent/financial advisor, has determined this annuity is suitable for his/her personal financial situation.

Signature of Acknowledging Individual

Date

Printed Name

OR

ANNUITY APPLICANT'S WAIVER OF TRUSTED INDIVIDUAL'S ACKNOWLEDGMENT

Although American Savings Life Insurance Company recommends the beneficiary, an immediate family member, or a trusted friend acknowledges my purchase of this annuity, I decline to have anyone additionally present during the annuity sales presentation or to acknowledge my financial understanding and the suitability of this annuity product. I hereby state that I am of sound mind, and I am capable of making financial decisions without requiring the assistance of anyone else.

Owner's Signature

Joint Owner's Signature (if applicable)

Owner's Printed Name

Date

Joint Owner's Printed Name

Date

AGENT ACKNOWLEDGMENT

I acknowledge that I was physically present during the annuity sales presentation and also witnessed the completion of this Senior Suitability form by the acknowledging individual or the Alternative Waiver.

Agent's Signature

Agent's Printed Name

Agent Number

Date