

QuickForm Updates

PruXpress QuickForm Revisions

Revised PruXpress QuickForm Revisions – 3/1/2021

Effective Monday, March 1, 2021, the *PruXpress QuickForm* (ORD 113034 201) will be revised to include the new Goldman Sachs Voyager Indexed Account. Please refer to the Ready to Sell List for state approval information. Additionally, the form will be revised to remove the Tele-interview section and to add clarifying instructions for third-party financial documentation.

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Revised *PruXpress QuickForm*

The *PruXpress QuickForm* (ORD 113034 201) has been revised as follows:

1. Section B:
 - #9: Email address is now required.
 - Add new #10: Contact phone numbers.
 - Add new #14: Related worksheets.
2. Remove Section C. Client Interview.
3. Section F:
 - Reformat #11.
4. Section H. Financial Details: Add new instructions:
 - “Financial information prepared by an independent third-party is required for applications with total face amounts of \$10,000,000 or more up to age 70, \$2,500,000 or more ages 71-80, \$1,000,000 or more ages 81 and up.
 - “If the Additional Financial Information form (ORD 86154-2013) is submitted in lieu of independent third-party financial documentation, the form is required to be completed by the third-party financial advisor and signed by the proposed insured(s), owner(s), and producer.”
5. Section L: Add new subsection 1B for PruLife Founders Plus UL (2020).
6. Add new disclaimer for Goldman Sachs Voyager account.
7. The form will carry a revision date of 2021.

The new form will be available on the PruXpress website Monday, March 1, 2021.