



Annuity Sales

Year-end reminders and important dates to remember

As we near the end of 2023, please be aware of the following upcoming dates and deadlines that could impact you and your clients.

Important year-end dates to note:

F&G offices holiday closures

- Noon CT, November 22 through November 24
- December 25
- January 1

Systems maintenance: November 24-26

All Life Insurance and Annuity New Business, Licensing and Policyholder platforms will be unavailable due to scheduled maintenance. Systems will resume operations beginning Monday, November 27. [Click here](#) for more information.

December 15: Last day to submit distribution requests to ensure processing in 2023. This includes requests for Required Minimum Distributions.

December 20: Pending fixed indexed annuity (FIA) applications must be funded and in good order to be processed and issued in 2023.

December 29: Pending multi-year guaranteed annuity (MYGA) applications must be funded and in good order to be processed and issued in 2023.

A few business rules to be aware of:

- Contributions received on or before **December 31, 2023** will be processed as 2023 contributions.
- Contributions received on or after **January 1, 2024** (including amounts postmarked in 2023) will be processed as 2024 contributions unless they include either of the following:
 - Intended contribution year specified in the memo section on the check.
 - Intended contribution year included in the letter of intent.
- If we receive a contribution in 2024 that is properly designated as a 2023 contribution, that designation is final.
- SEP funds are posted for the year in which we receive them.

Please note that we may require policyholders to submit excess contribution forms should they notice later that contributions are for the incorrect tax year.

Questions?

Please contact us at **800.445.6758**, or visit **SalesLink®**.

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