Directory

Annuity Agreement Files

The basic annuity agreements (agreements-base.docx), New York annuity agreements (NY agreements.docx), flexible deferred annuity agreements (flex dga-agreements.docx), and New York flexible deferred annuity agreements (NY flex dga-agreements.docx) in the prototype documents folder are formatted with each agreement as a new section.

The easiest way to go to a particular agreement is by finding the section number. A complete list of section numbers is set out below.

To go to a specific section in Word:

1. Press Ctrl-f.
2. Click the down icon at the far right of the Search document field:



1. Click the Go To tab, then choose Section.
2. Enter the applicable section number, then click the Go To button.

If you wish to print a particular agreement, highlight a particular section for printing (or copying as a new document). When doing this, be sure to highlight through the ending section break, or the footers will not appear.

**agreements-base.docx Section**

One Life—Donor is the Annuitant 1

One Life—Donor is the Annuitant (Payments are Deferred) 2

One Life—One of the Donors is an Annuitant, Funded with

Jointly-owned or Community Property 3

One Life—One of the Donors is an Annuitant, Funded with

Jointly-owned or Community Property (Payments are Deferred) 4

One Life—Donor is Not the Annuitant 5

One Life—Donor is Not the Annuitant (Payments are Deferred) 6

One Life—Neither Donor is an Annuitant, Funded with Jointly-owned

or Community Property 7

One Life—Neither Donor is an Annuitant, Funded with Jointly-owned

or Community Property (Payments are Deferred) 8

Two Lives—Donors are the Annuitants, Joint and Survivor,

Funded with Jointly-owned or Community Property 9

Two Lives— Donors are the Annuitants, Joint and Survivor,

Funded with Jointly-owned or Community Property (Payments

are Deferred) 10

Two Lives—Donor is an Annuitant, Joint and Survivor, Funded  
with Donor’s Separate Property 11

Two Lives— Donor is an Annuitant, Joint and Survivor, Funded  
with Donor’s Separate Property (Payments are Deferred) 12

Two Lives—Joint and Survivor, Donor is Not an Annuitant 13

Two Lives—Joint and Survivor, Donor is Not an Annuitant

(Payments are Deferred) 14

Two Lives—Joint and Survivor, Funded with Jointly-owned or

Community Property, Donors are Not the Annuitants 15

Two Lives—Joint and Survivor, Funded with Jointly-owned or

Community Property, Donors are Not the Annuitants

(Payments are Deferred) 16

Two Lives—Successive Interests, Donor is the First Annuitant 17

Two Lives—Successive Interests, Donor is the First Annuitant

(Payments are Deferred) 18

Two Lives—Successive Interests, Donor is Not an Annuitant 19

Two Lives—Successive Interests, Donor is Not an Annuitant

(Payments are Deferred) 20

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, Both Donors are Annuitants 21

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, Both Donors are Annuitants

(Payments are Deferred) 22

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, One of the Donors is the First Annuitant,

the Second Annuitant is a Non-Donor. 23

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, One of the Donors is the First Annuitant,

the Second Annuitant is a Non-Donor (Payments are Deferred). 24

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, Neither Donor is an Annuitant 25

Two Lives—Successive Interests, Funded with Jointly-owned or

Community Property, Neither Donor is an Annuitant

(Payments are Deferred) 26

**NY agreements-base.docx Section**

One Life—Donor is the Annuitant 1

One Life—Donor is the Annuitant (Payments are Deferred) 2

One Life—One of the Donors is an Annuitant, Funded with

Jointly-owned or Community Property 3

One Life—One of the Donors is an Annuitant, Funded with

Jointly-owned or Community Property (Payments are Deferred) 4

One Life—Donor is Not the Annuitant 5

One Life—Donor is Not the Annuitant (Payments are Deferred) 6

One Life—Neither Donor is an Annuitant, Funded with Jointly-owned

or Community Property 7

One Life—Neither Donor is an Annuitant, Funded with Jointly-owned

or Community Property (Payments are Deferred) 8

Two Lives—Donors are the Annuitants, Joint and Survivor,

Funded with Jointly-owned or Community Property 9

Two Lives— Donors are the Annuitants, Joint and Survivor,

Funded with Jointly-owned or Community Property (Payments

are Deferred) 10

Two Lives—Donor is an Annuitant, Joint and Survivor, Funded  
with Donor’s Separate Property 11

Two Lives— Donor is an Annuitant, Joint and Survivor, Funded  
with Donor’s Separate Property (Payments are Deferred) 12

Two Lives—Successive Interests, Donor is the First Annuitant 13

Two Lives—Successive Interests, Donor is the First Annuitant

(Payments are Deferred) 14

**flex agreements.docx & NY flex dga-agreements.docx Section**

One Life—Donor is the Annuitant 1

One Life—Donor is Not the Annuitant 2

Two Lives—Donors are the Annuitants, Joint and Survivor,

Funded with Jointly-owned or Community Property 3

Two Lives—Successive Interests, Donor is the First Annuitant 4

Two Lives—Successive Interests, Donor is Not an Annuitant 5