



**SELECT ACCOUNT MANAGEMENT OR CUSTOMIZED ACCOUNT MANAGEMENT**

using Variable Annuities

Before submitting variable annuity business to QIM, please call us (877-775-0200) for more information regarding variable annuity restrictions, special forms, and management styles allowed.

Company	Required Form	Phone Number
AIG SunAmerica	Owner Authorization for PAS & Withdrawal Request for Fees	800-445-7862
Allianz	Schedule A & Customer Auth of Transfer by 3rd party (Fax to 610-296-7206)	800-624-0197
American Skandia	Own TPA form and QIM Agreement	800-628-6039 or 800-752-6342
Annuity Investors	Own TPA form and QIM Agreement	800-789-6771
Annuity Investors/Great Amer Fncl Resources	Variable Annuity Contract Management Agreement	(800) 789-6771
AXA Equitable (formerly MONY)	Own TPA form (fax form to 201-583-2226)	800-789-7771
Hartford	Own RIA Fee Pmt & Transfer Auth. Form pg 1-3(Clients initial both for transfers & fees). Need 7 days to process form before trades	800-862-7155
ING	ING Investment Advisor Declaration form and Schedule A	800-325-3792
Jefferson National	Advisor Authorization Agreement. (No fee redemption agreemt required).	(502)587-3845
Lincoln Benefit Life	LBL transfer authority & LBL fee authority ORIGINALS MUST BE MAILED (+ 3-5 days to process)	800-865-5237
Lincoln Financial		800-454-6265
Nationwide	Own TPA form and QIM Agreement	800-321-6064
Phoenix	Letter of instruction from the owner listing the company and contacts w/ last 4 digits of SS# for verification when you call.	Fax to 860-513-6285 client services
Security Benefit Life	Own TPA form and QIM Agreement	E-Services 800-355-4560
TransAmerica	Authorization Form & Fee Paymt Form	800-852-4678