

Quick Tips for Advisors

Selling Agreement

With the exception of two states requiring pre-appointment (PA & MT), we will process new business on a “just-in-time” basis. Please ensure that contracting is submitted prior to completing a client application. If we receive contracting after an application is submitted, the application will be delayed. TriVysta Agent Training must be completed before a client application is dated. Please [click here](#) for TriVysta Agent Training.

New Business

Submitting Applications

TriVysta applications may be submitted by email to NewBus@TriVysta.com. The original of Transfer/1035 Exchange Form is required. Send original Transfer/1035 Exchange Form and/or check by overnight delivery to the address below.

Dallas Financial Wholesalers
7512 San Jacinto Place #100
Plano TX 75024

Applications not emailed should be sent by FedEx or UPS delivery to the address above. Please do not use regular mail.

Processing Standards

TriVysta is issued daily. Guggenheim dates the business as of the day when cash is received. Contract processing activities take two business days before the policy is sent to the agent.

Contract Mailing

Policies will be sent to the agent. Policies under \$200,000 are sent regular mail USPS. Policies \$200,000 to \$499,999 are sent FedEx 2-Day Delivery and policies \$500,000 plus are sent by FedEx Overnight Delivery.

1035 Exchanges & Transfers

After sending our Letter of Acceptance to the transferring company we follow up every 7 days until funds are released.

Required Minimum Distribution

The current year's RMD should be taken prior to transfer/rollover to TriVysta. Any withdrawal taken during the first contract year should be requested via partial withdrawal and will result in a chargeback to the agent on the amount withdrawn. Automated RMD withdrawals can commence after the first anniversary. If the Lifetime Withdrawal Rider is included, any withdrawal taken prior to starting guaranteed lifetime income reduces income value proportionally.

Advisor Assistance

- For **LIVE Assistance** 8AM to 5PM CST call **(800) 746-8397**
- For pre-sale questions email Support@TriVysta.com
- For client application status email NewBus@TriVysta.com
- Missing application requirements can be sent to NewBus@TriVysta.com
- For agent contract status email Contracting@TriVysta.com
- Missing agent contract requirements can be sent to Contracting@TriVysta.com
- **Application material** may be **printed directly** from www.TriVysta.com