

RMD Friendly Companies

What does it mean to be RMD Friendly?

- If a client has to take out more than their annual free withdrawal amount in order to satisfy their Required Minimum Distribution they will NOT be hit with surrender charges on the amount over the annual free withdrawal.

Insurance Company	RMD Friendly?
AIG American General	Yes
Allianz	Yes
American National	Yes
Aviva	Yes
Genworth	Yes
ING ReliaStar	Yes
ING/USA	Yes
Lincoln Financial Group	Yes
North American	Yes
Old Mutual Financial Group	Yes
Reliance Standard	Yes
The Standard	Yes

*North American will re-capture commissions if withdrawal is taken within the first year.

www.imeriti.com

Offices in California | Washington | North Dakota