

Allianz Variable Annuity — New Business Checklist

In order to do business with Lorence and Vander Zwart and Allianz:

1. LVZ must have on file a signed Solicitors Agreement.

In addition to the form listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.

The following forms need to be completed and returned directly to LVZ to add third party management.

LVZ Investment Management Agreement Form
LVZ Investor Suitability Questionnaire
LVZ Solicitor Disclosure Brochure
Allianz Third Party Money Manager Authorization

The following forms need to be completed sent directly to Allianz to establish the account.

Allianz Variable Annuity Application
Allianz Transfer of Assets / 1035 Exchange Forms



Did you know:

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?