

DOL Reference Guide

BICE or 84-24

Originating Product	Destination Product (New Solution)				
	Qualified (FIA)	Non Qualified (FIA)	Life Insurance (Non Qualified)	Qualified (FA)	Non Qualified (FA)
Qualified (Non-FA)	BICE	BICE	84-24	84-24	84-24
Non Qualified (Non-FA)	BICE	N/A	N/A	84-24	N/A
Life (Non Qualified)	BICE	N/A	N/A	84-24	N/A
Qualified (FA)	BICE	BICE	84-24	84-24	84-24
Non Qualified (FA)	BICE	N/A	N/A	84-24	N/A
Qualified (FIA)	BICE	BICE	84-24	84-24	84-24
Non Qualified (FIA)	BICE	N/A	N/A	84-24	N/A

KEY:

FA = Fixed Annuity

FIA = Fixed Index Annuity

VA = Variable Annuity

BICE (Best Interest Contract Exemption) = Will require Financial Institution (FI) to sign and oversee

84-24 (Prohibited Transaction Exemption) = Will require additional disclosure, including commissions, etc.

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