

Transition Rules

Indexed Advantage UL

August 2024

IMPORTANT DATES (subject to state approval)

- **August 18, 2024 (Retirement Date¹):** PruLife Index Advantage UL[®] will be retired. All Indexed Advantage UL applications must be signed and dated on or before August 18, 2024.
- **August 23, 2024 (Home Office Receipt Date¹):** Last day that an Indexed Advantage IUL application can be received in the Home Office.
- **November 1, 2024 (Placement Date¹):** Last day that a pending Indexed Advantage UL case can be placed. All delivery requirements must be received in good order by end of business day (4 PM EST).
- **November 1, 2024 (1035 Exchange Date¹):** Indexed Advantage UL cases involving 1035 exchange must be initiated/ started by November 1, 2024. If the 1035 initiation/start deadline is met, the policy will not be subject to an additional placement deadline.

APPLICATIONS WITH PENDING OWNERSHIP ARRANGEMENTS

- Updates to applications as part of establishing a trust or finalizing the ownership arrangement can be made after the application deadlines outlined in the Transition Rules. However, these cases must still meet the application deadlines for the original application and comply with all other deadlines outlined in the Transition Rules.

INFORMAL/INQUIRY APPLICATIONS

- Informal/Inquiry applications will not be eligible for Indexed Advantage UL unless replaced by a live application signed by August 18, 2024, and received in the Home Office by August 23, 2024.

TERM CONVERSIONS

- Term Conversions are subject to the same dates in the **Important Dates** section above. They must also be conversion eligible at the time of application.

¹ Definition of "date":

- Pru Advisors Prepaid eLife - Date on the form of payment and the Authorization, Acknowledgment and Limited Insurance Agreement form.
- Pru Advisors COD eLife - Date the Authorization, Acknowledgment, and Limited Insurance Agreement form and Variable Contract Acknowledgment form (if applicable) were signed by the client.
- Pru Advisors or Third-Party Full Application case - Date the Part 1 of application (ORD 96200) was signed.
- Third Party Prepaid Xpress QuickForm case - Date on the form of payment, the Authorization to Release Information form, and the Limited Insurance Agreement form.
- Third Party COD Xpress QuickForm case - Date the Authorization to Release Information form and Variable Contract Acknowledgment form (if applicable) were signed by the client.

PruLife Index Advantage UL[®] is issued by Pruco Life Insurance Company, a Prudential Financial company located in Newark, NJ. PruLife Index Advantage UL is not available in New York state.

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