

FIELD BULLETIN

February 1, 2021

A guide to tax document mailings for producers

There are a variety of tax documents related to your Traditional Life business with Global Atlantic and our subsidiary companies. Since each producer's book of business is unique, the types of documents each producer will receive will vary. Not all producers will receive each type of document.

You may find it useful to refer to this chart as a guide to tax documents you could receive.

Tax Document Type	Company Generating the Tax Document	Return Address on the Tax Document	Business Purpose for this Document
W2	Accordia Life and Annuity Company	215 10th Street Des Moines, IA 50309	FICA Eligible compensation
1099NEC	Accordia Life and Annuity Company	20 Guest Street Brighton, MA 02135	Leaders Club taxation. Amounts will vary based on trip participation.
1099NEC	Accordia Life and Annuity Company	1275 Sandusky Road Jacksonville, IL 62650	Agent Compensation
1099C	Accordia Life and Annuity Company	1275 Sandusky Road Jacksonville, IL 62650	Debt Settlement and Loan Forgiveness
1099NEC	Athene Annuity and Life Company	1275 Sandusky Road Jacksonville, IL 62650	Agent Compensation
1099NEC	First Allmerica Financial Life Insurance Company (FAFLIC)	1275 Sandusky Road Jacksonville, IL 62650	Agent Renewal Compensation for business issued under Aviva Life and Annuity Company of New York
1099NEC	Accordia Life and Annuity Company	20 Guest Street Brighton, MA 02135	COLI-related Compensation

Producers with Global Atlantic retirement accounts administered by Principal may see additional tax documents from Principal or one of their affiliates. If you have questions related to your retirement accounts, please contact Principal at 800-986-3343.

If you have questions about your Accordia Life or Athene Annuity and Life tax documents, please contact us at commissions@gafg.com or by phone at 855-887-4487, option 7 for Agency Services.