

Allianz Life Foreign National Program Cover Letter

Financial professional name _____

Financial professional firm name _____

Proposed policy owner name _____

Proposed policy owner's foreign address _____

Proposed policy owner's country of citizenship _____

Proposed policy owner's country & city of residence

China

City (check one)

- | | | | |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| <input type="checkbox"/> Shanghai | <input type="checkbox"/> Chengdu | <input type="checkbox"/> Changzhou | <input type="checkbox"/> Zhengzhou |
| <input type="checkbox"/> Guangzhou | <input type="checkbox"/> Chongqing | <input type="checkbox"/> Shantou | <input type="checkbox"/> Qingdao |
| <input type="checkbox"/> Beijing | <input type="checkbox"/> Tianjin | <input type="checkbox"/> Nanjing | <input type="checkbox"/> Shenyang |
| <input type="checkbox"/> Shenzhen | <input type="checkbox"/> Hangzhou | <input type="checkbox"/> Jinan | <input type="checkbox"/> Wenzhou |
| <input type="checkbox"/> Wuhan | <input type="checkbox"/> Xi'an | <input type="checkbox"/> Harbin | <input type="checkbox"/> Nanchang |

Canada

Province (check one)

- | | | | |
|--|--|---|--|
| <input type="checkbox"/> New Brunswick | <input type="checkbox"/> Ontario | <input type="checkbox"/> Yukon | <input type="checkbox"/> Nova Scotia |
| <input type="checkbox"/> Nunavut | <input type="checkbox"/> Quebec | <input type="checkbox"/> Prince Edward Island | <input type="checkbox"/> Newfoundland and Labrador |
| <input type="checkbox"/> Saskatchewan | <input type="checkbox"/> Northwest Territories | | |

Hong Kong

City _____

Taiwan

City _____

Mexico

City _____

Desired insurance coverage amount

\$ _____

Proposed policy owner's primary language _____ Do they speak English? Y N

What accommodations have been made if the proposed policy owner does not speak English?

Proposed policy owner's profession _____

U.S. Nexus

Check at least one that applies to the proposed policy owner.

- Owns real property in the U.S. or have other significant U.S. property ownership interests;
- Maintains a permanent U.S. residence;
- Maintains an investment interest in the U.S. that may include U.S. investment account ownership;
- Is an employee of a U.S. based company;
- Has primary employment in the U.S.;
- Owns a business in the U.S.;
- Owns an established foreign company actively engaged in business for the past 12 months and transacting business in the U.S.;
- Has significant and systematic ongoing business activities in the U.S. such as regular physical visits or a presence in the U.S. for purposes of conducting business;
- Has U.S. income, business, or estate tax liability and/or estate, tax, or financial planning needs in the U.S.;
- Is married (as defined by U.S. Tax Code) to a U.S. Citizen, a Lawful Permanent Foreign National or (subject to individual review Allianz Life Underwriting and Legal), a Conditionally Approved Lawful Permanent Foreign National;
- Has a U.S. financial account with a \$500,000 minimum balance (for the past six months, if this is the only basis of need for U.S. based life insurance).

Proposed policy owner’s need for U.S. life insurance based on the (1) suitable placement of the life insurance product itself; and (2) Substantial U.S. Nexus.

Please return this completed cover letter with the application and other forms to Allianz Life New Business at lifeinsurance@send.allianzlife.com.