







SPECIMEN DOCUMENTS
More Information



UPDATES

Following is a list of the documents added or revised for the July 2018 (v.2018.07) release of **Specimen Documents**. Click on a box to go immediately to the new or revised document.

-  [Estate Planning Factfinder](#)
-  [Estate Planning Checklist](#)
-  [Sample Donor Letter Informing Charity of Forthcoming Qualified Charitable Distribution](#)
-  [Sample Owner Letter to IRA Trustee/Custodian Directing Qualified Charitable Distribution](#)

This information is provided by American General Life Insurance Company (AGL) and The United States Life Insurance Company in the City of New York (US Life), members of American International Group, Inc. (AIG).

All companies mentioned, their employees, financial professionals, and other representatives, are not authorized to give legal, tax, or accounting, advice, including the drafting or execution of any legal document. Applicable laws and regulations are complex and subject to change. Any tax statements in this material are not intended to suggest the avoidance of U.S. federal, state or local tax penalties. AGL and US Life shall not be liable for any loss or damage caused by the use of, or reliance on, the tax, accounting, legal, investment or financial items contained in this material.

FOR FINANCIAL PROFESSIONAL USE ONLY-NOT FOR PUBLIC DISTRIBUTION

©2018-2019. All rights reserved.