ADMINISTRATIVE POLICY CHANGE FORM

COMPLETE THIS SECTION FOR ALL REQUESTS

Insured/Annuitant: ___________________________ Policy #: ___________________________

Address: ___________________________ City: ___________________________ State: _______ Zip: _______

Owner's Address (if different than insured): ___________________________

Daytime Phone #: ( _______ ) Family Group #: ___________________________

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1. ☐ ADDRESS CHANGE: ☐ Insured/Annuitant ☐ Policyowner ☐ Payer ☐ Assignee ☐ Beneficiary

Address: ___________________________

City: ___________________________ State: _______ Zip: _______

☐ Change address on these policies as well: ___________________________

(List All Policy Numbers)

2. ☐ CASH SURRENDER (FULL TERMINATION OF CONTRACT): Section 16 Must Also Be Completed

The cash surrender value is hereby requested and will be accepted in full payment of and release of all claims under the policy. The surrender will be effective in accordance with the policy provisions.

3. ☐ PARTIAL SURRENDER/WITHDRAWAL (UNIVERSAL LIFE AND ANNUITIES ONLY): Section 16 Must Also Be Completed

FROM: ☐ Universal Life (May be subject to surrender charges and will reduce the death benefit of the policy)

☐ Annuity (May be subject to surrender charges)

AMOUNT: ☐ $ ______________________ ☐ Maximum amount not subject to surrender charge
4. **POLICY LOAN:**

   - $__________________________
   - Maximum amount available

   **DISTRIBUTION:**
   - Check
   - Pay the loan or premium(s) due on policy # ______________________
   - Total number of premiums to pay = ____________

   **LOAN AGREEMENT:** In consideration of the advance by the Company as a loan, all right and interest in the policy is assigned to the Company as sole security for the repayment of the loan with interest, subject to the provisions of the policy.

5. **DIVIDEND OPTION CHANGE:** Section 16 Must Also Be Completed If Change Is To “Accumulate At Interest”

   - Paid in Cash
   - Reduce Premium
   - Accumulate at Interest
   - Paid-Up Additions
   - Purchase Additional Permanent Insurance – Internal (For use with PUL products only)

6. **DIVIDEND WITHDRAWAL:**

   **FROM:**
   - Accumulations
   - Paid-Up Additions cash value

   **AMOUNT:**
   - Full amount
   - $ ______________ or full amount available (if less)

   **DISTRIBUTION:**
   - Check
   - Pay the loan or premium(s) on policy # ______________________
   - Total number of premiums to pay = ____________

7. **MODE CHANGE:**

   Effective with the next premium due or the next anniversary, I request to change my mode of payment to:

   - Annual
   - Semi-Annual
   - Quarterly
   - Monthly (if available)
   - Check-O-Matic/EFT (attach form 1552CFG)

8. **PREMIUM CHANGE (Universal Life and Annuity contracts only):**

   Effective with the next premium due, I request to change the billed amount to: $ ______________________

9. **ENDORSE POLICY IN ACCORDANCE WITH NON-FORFEITURE PROVISIONS:**

   Effective with the current premium due, if available, I request that the status of my policy be changed to:

   - Reduced Paid-Up Insurance
   - Extended Term Insurance

10. **NON-FORFEITURE OPTION CHANGE:**

    I request the following non-forfeiture option, if available, to apply in accordance with the policy provisions.

    - Reduced Paid-Up Insurance
    - Extended Term Insurance

11. **AUTOMATIC PAYMENT OF PREMIUM BY LOAN OPTION:**

    - Add option to policy, if available
    - Remove option from policy

12. **DUPLICATE CERTIFICATE:**

    I have lost my policy and request that a duplicate certificate be issued to me.
12. **NAME CHANGE:**

- Insured/Annuitant
- Policyowner
- Payer
- Assignee
- Beneficiary

Print new name (in full): ________________________________

Reason for change: ☐ Marriage ☐ Divorce ☐ Court Order ☐ Other ________________________________

Submit proof such as: driver’s license, marriage license, court order, etc. (List Reason)

13. **RELEASE OF ASSIGNMENT:**

For value received, ________________________________

(releasee)

releases all right, title, and interest in the policy from the assignment dated ________________________________

14. **BENEFICIARY CHANGE:**

- Basic Policy
- Rider Benefit

**IMPORTANT:** Separate forms are required for different designations to both benefits

**Instructions:** If a separate page is used for your beneficiary designation, it must contain the policy number, the insured’s name, the complete designation information (including names, addresses, relationships, and percentages where applicable), and be signed by the policyowner, the owner’s spouse (if community property state), the irrevocable beneficiary (if one currently exists on the policy) and be witnessed by someone other than the insured, policyowner, or beneficiary.

Any previous beneficiary designation and or optional mode of settlement with respect to any death benefit proceeds payable at the death of the insured is revoked. Any such proceeds shall now be paid in one sum as follows:

Note: If no percentage is given, proceeds will be paid in equal shares to primary beneficiaries who survive the insured and if no primary beneficiaries survive the insured, proceeds will be paid in equal shares to contingent beneficiaries who survive.

**PRIMARY BENEFICIARIES:**

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15. **OWNER CHANGE:** ☐ FOR GIFT ☐ FOR VALUE Section 16 Must Also Be Completed & Signed By New Owner

Transfer Ownership To: ☐ Individual ☐ Qualified Plan ☐ Corporation ☐ Trust (Include Trustee Names & Date of Trust)

Full Name Of New Owner: __________________________
Complete Address: __________________________

Contingent Owner:
Full Name: __________________________
Complete Address: __________________________

Payer Change:
Send Premium Notices To: ☐ Insured/Annuitant ☐ Policyowner ☐ Other (Give Full Name & Address Below):
Full Name: __________________________
Complete Address: __________________________

16. **TAXPAYER IDENTIFICATION NUMBER CERTIFICATION:** Sign Request In This Section And Section 17

FAILURE TO COMPLETE THIS SECTION MAY RESULT IN MANDATORY 24% BACKUP WITHHOLDING WHERE REQUIRED BY THE IRS.

Withholding Election: ☐ I do not want to have Federal or State income tax withheld.
☐ I want to have Federal or State income tax withheld.

Federal Withholding: ☐ _________ % or ☐ $ ____________
State Withholding: ☐ _________ % or ☐ $ ____________

Taxpayer Identification Number:

Certification Instructions: You must cross out item (2) below if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return.

Certification: Under penalties of perjury, I certify that: (1) The number shown is my correct taxpayer identification number (or I am waiting for a number to be issued to me); (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and (3) I am a U.S. person (including a U.S. resident alien).

Policyowner’s Signature: __________________________ Dated: __________________________

17. **SIGNATURES:**

Instructions For All Requests:
1. Policyowner must sign and date this form.
2. Insured must sign this form if the change to section 14 is for a rider.
3. All irrevocable beneficiaries and collateral assignees must sign this form.
4. Signatures must be witnessed. Witness cannot be the policyowner, policyowner’s spouse, insured, assignee or beneficiary.
5. Transactions resulting in a payment will have the check addressed to the owner and the owner’s address.

Signed At (City & State): __________________________ Date: __________________________

Signature of Present Owner __________________________ Signature of Assignee __________________________

Signature of Insured (if other than Present Owner) __________________________ Signature of Irrevocable Beneficiary __________________________

Signature of Witness (See Instruction #4) or Notary (if required) __________________________