

CHANGE OF NAME

Please complete ALL information requested.

I authorize a change of name for contract number _____ on _____ owned by _____. This request should be accompanied by a photocopy of official documentation for the name change: Marriage Certificate, Divorce Decree, or Official Government Identification.

This is to certify the change of name for (check one)

- Annuitant
- Owner

by reason of (check one)

- Divorce
- Marriage
- Other _____

Please print new complete legal name – e.g. Mary Jane Smith not Mrs. John J. Smith:

The following statement is required by the IRS: Under penalty of perjury, I certify that the number shown on this form is my correct Social Security Number and I am not subject to backup withholding.

I certify that I am not under guardianship, nor have I made any assignment, pledge, or executed any document affecting ownership or right to any monies due or to become due under this contract, and further that no proceedings in bankruptcy are pending to which I am a party.

This form dated at _____ on the ____ day of _____, 20____.
City/State

Signature of Owner(s) (if Joint – both must sign) _____
Owner's Social Security Number or Taxpayer ID Number (_____) _____
Owner's Telephone Number

Signature of Witness* (_____) _____
Telephone Number of Witness _____
Owner's E-mail Address (if available)

*Owner's signature must be witnessed by an adult who is not a Beneficiary or newly named Owner.

After we have recorded the change, an acknowledged copy will be sent to you to be kept with your contract.

For Home Office Use

Recorded By _____ Date _____