

## INSTRUCTIONS FOR COMPLETION OF BENEFICIARY STATEMENT AND PAYMENT OPTION ELECTION FORM

### FILLING OUT THE BENEFICIARY STATEMENT

- x Complete sections A and B in full.
- x If a Payment Contract is selected in item C1 of the Beneficiary Statement, complete Payment Option Election Form (431-205).
- x A Change of Name option in item C3 may only be used in cases where a spouse is beneficiary of an Annuity policy.
  - o Also complete Beneficiary Designation Form 433-64.
- x Complete Section D only if the claim is submitted under an Annuity policy.
- x Read Sections E carefully.
- x Sign on page 4 and provide additional information, as required. Beneficiary retains pages 5 and 6.

### WHO SHOULD COMPLETE THE BENEFICIARY STATEMENT AND WHAT IS REQUIRED?

- x One Beneficiary, multiple policies: One form may be used for multiple policies, unless a different Method of Payment is desired for each policy.
- x If a Beneficiary has predeceased the insured: We will need a copy of the death certificate for the deceased Beneficiary.
- x If proceeds are payable to a minor child: The legally appointed conservator(s) for the minor must complete this form and a certified copy of the appointment of conservatorship is required. The social security number in item B4 should be that of the minor child.
- x If proceeds are payable to an estate: The appointed legal representative(s) of the estate should each complete the form. A certified copy of the court appointment is required. If the estate is not probated, contact the Claim Department. The tax identification number in item B4 should be the tax identification number for the decedent's estate.
- x If proceeds are payable to an inter vivos trust (revocable or irrevocable): Separate Beneficiary Statements must be completed by each trustee. Submit at least the first page, signature page, and pages naming the trustees (or successor trustee(s) of the trust document. A Trustee Certification (433-044) is required. The tax identification number in item B4 should be that of the trust.
- x If proceeds are payable to a testamentary trust: Separate Beneficiary Statements must be completed by each trustee. Submit a copy of the Last Will and Testament along with evidence, as required by the company, of the validity of the Will such as letters of administration. A Trustee Certification (433-044) is required. The Tax Identification number in item B4 should be that of the trust.
- x If proceeds are payable under a collateral assignment:

Return form to address at upper left.

## BENEFICIARY STATEMENT

- Please print clearly when completing this form.
- Answer all questions.
- If there is more than one Beneficiary, we require a separate Beneficiary Statement signed by each Beneficiary.
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Insured: \_\_\_\_\_

Policy #: \_\_\_\_\_

Beneficiary Name: \_\_\_\_\_

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E. AUTHORIZATION FOR RELEASE OF INFORMATION (continued)

I understand that I have the right to see personal information collected about me, and have the right to correct any information that may be wrong. I understand that I may obtain a description of this Company's information practices by requesting one from my agent or the Company at the address provided with my Policy.

This Authorization is valid for one year from the date below. A copy of this Authorization shall be as valid as the original.



