Administrative Forms Pack

Request for Transfer or Exchange of Assets (LAD-1120)

Use this form to transfer assets for the issuance of a new or existing annuity contract. The source of the assets may be another annuity contract, mutual fund, a bank CD or a brokerage account. This form includes a rate lock question. Please follow the procedures below:

1. Complete and sign the annuity application.
2. Complete and sign the transfer form (LAD-1120).
3. If replacing another annuity, either enclose the annuity contract or note on the transfer form that it is lost.
4. Complete state specific forms where necessary. Currently these are required in:
   AL(2) AR AZ(2) CA CO(2) DE FL(2) HI(2) ID IL(2) IN KS KY(2)
   LA(2) MA MD(2) MO MN MS(2) MT(2) NC(2) NE NH(2) NJ(2) NM(2)
   NV OH OK(2) OR(2) PA RI(2) SC SD TN UT(2) VT(2) WA WI WV(2)
   WY

Non Financial Change Form (3349-GEN-04)

Use this form to change address, names, maturity date, beneficiary, owner, or annuitant.

Distribution Request Form (3771-GEN—06)

Use this form to request distributions, set up Required Minimum Distributions, or make an internal loan repayment by distribution.

Systematic Distribution Form (3361 – GEN – 04)

Use this form to set up a new systematic distribution or change an existing systematic distribution.

Pre Determined Death Benefit Payout Election Form (LAD – 1153)

Use this form to control how your Beneficiary receives death benefit proceeds. This form may also be used to cancel any previous payout election.

Annuity Income Option

Use this form to set up an Annuitization.

Pre-Authorized Checking Agreement (3352-GEN-04)

Use this form to automatically deposit subsequent premiums to your existing annuity, loan repayment Pre-Authorized Check set-up, or change an existing Pre-Authorized Checking Agreement.

Required Distribution Election Form (3566-GEN-05)

Use this form to set up a required minimum distribution.