QUALIFIED FUNDS
IDENTIFICATION WORKSHEET

To be completed whenever the annuity is to be used to fund an IRA

Sales Representative: ___________________________ Branch: _________________________

Owner Name:___________________________________ Contract Number: ________________

Is this a CONTRIBUTORY IRA? ❑ YES ❑ NO

If YES, indicate amount and tax year assignment for the contribution(s)

Amount $ ______________________ Tax Year _________________

Amount $ ______________________ Tax Year _________________

Is this an IRA TRANSFER? ❑ YES ❑ NO

If YES, show name of previous IRA trustee/custodian____________________________________

Is this a IRA ROLLOVER? ❑ YES ❑ NO

If YES, show name of fund source____

If YES, indicate type of rollover funds:

❑ IRA ❑ TSA ❑ KEOGH ❑ SEP

____ _________________________

Signature of Owner Date

____

Signature of FI Sales Rep

Original - United American • **Yellow -** Customer • **Pink -** Sales Representative

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