Liberty National
Life Insurance Company
3700 S. STONEBRIDGE DRIVE • POST OFFICE BOX 8080 • MCKINNEY, TEXAS 75070-8080

QUALIFIED FUNDS IDENTIFICATION WORKSHEET

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

Agent: ______________________ Branch: ______________________

Annuitant/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, provide name of previous IRA trustee/custodian______________________

Is this an IRA ROLLOVER? ❑ YES ❑ NO

If YES, provide name of fund source ______________________

If YES, indicate type of rollover funds:

❑ IRA ❑ 401K ❑ TSA ❑ KEOGH ❑ SEP

______________________ ______________________ ______________
ANNUITANT/OWNER SIGNATURE ANNUITANT/OWNER PRINTED NAME DATE

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