



Non-Natural Owner Acknowledgement

For questions or help with this form, call us at **877-253-2323**.
Throughout this form, “the Company” refers to the issuing company.¹

1

Contract Information (please print clearly)

Contract Number (if available)

Owner/Entity Name

TIN

Address

City

State

Zip Code

In case we need to contact you about this request

Daytime Phone

2

Tax Information

This section is for information only. No action is required.

- According to Internal Revenue Code Section 72(u), if any annuity contract is held by a “non-natural person” and that person is not holding the contract as an agent for a natural person:
 - the contract is not treated as an annuity contract for income tax purposes, and
 - income on the contract for each tax year is treated as ordinary income received or accrued by the owner/entity during that tax year.
- The Company will not issue any entity tax returns. Instead it will issue IRS form 1099-R reflecting only withdrawals that have occurred in the current tax year.
- Any amounts shown on the 1099-R may not reflect the amount reportable as taxable income by the entity named above. The data that can be used to calculate this income is available on the quarterly annuity performance statement for the annuity.
- When an annuitant or co-annuitant named on the contract passes away or is removed from the contract, full distribution of the contract may be required under relevant provisions of the Internal Revenue Code Section 72(s).

3 Certification

The authorized signer(s) listed below acknowledge and agree that:

- I/we are authorized to purchase or surrender annuity contracts and to give the Company instructions regarding the annuity contract on behalf of the entity named above. These instructions are binding on the entity.
- Unless the entity advises the Company in writing to the contrary, any one of the authorized signers identified below may independently exercise any of the powers certified to in this document and may individually act on behalf of and bind the entity and execute any documents on behalf of the entity that the Company may require.
- If this form is submitted in connection an application for an annuity contract, the entity has an insurable interest in the life of the annuitant(s) named in the application.
- I/we agree to promptly inform the Company, in writing, of any changes in the composition of the authorized signers listed below, or any other event that could alter the certifications made in this document. The Company may rely on this certification until it receives signed written notice of any changes as noted above.
- The Company will not assume any responsibilities other than its contractual obligations as the issuer of a deferred annuity contract.
- I/we do not hold the Company responsible for any tax consequences of the purchase of this annuity and confirm that I/we understand the tax requirements applicable to this investment.
- The information contained in this document is correct and I/we understand and agree that the Company will rely on this information for all purposes related to issuing and servicing an annuity contract held by the entity named above.
- On behalf of the Owner/entity, I/we fully indemnify and hold harmless the Company and its affiliates from any and all losses, liabilities, claims and costs (including reasonable attorneys' fees) that the Company may incur as a result of its reliance on the certifications made above.

4 Signature(s)

All authorized signers must sign this form.

Signature X	Date (mm/dd/yyyy)
Please Print Name Below	

Signature X	Date (mm/dd/yyyy)
Please Print Name Below	

Signature X	Date (mm/dd/yyyy)
Please Print Name Below	

Contact Us

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