

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 Numb	oer:		
Is this a CONTRIBUTORY IRA?	☐ YES	□ NO				
If YES, indicate amount and tax year as	ssignment for t	he contri	bution(s)			
Amount \$	Tax Year					
Amount \$	Tax Year					
Is this an IRA TRANSFER?	☐ YES	□ NO				
If YES, provide name of previous IRA to	rustee/custodia	ın				
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/OWN	FR PRINTFI	D NAME	DATE		
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AGENT SIGNATURE	AGENT PRINTED NAME			DATE		



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