

# NON-RESIDENT VERIFICATION FORM

## INSTRUCTIONS

Generally, insurance products should not be solicited outside the state where the Owner resides. However, in some cases it may be permissible for an Owner to complete and sign an application in other states. Such transactions may be proper when the Owner has a significant connection to the non-resident state, such as a second home, place of employment, or a pattern of business dealings that brings the owner to the non-resident state for purposes other than to purchase life insurance or annuity products.

Some states prohibit non-resident sales to residents of their states. It is our interpretation that the insurance regulations of **Alabama, Arkansas, Massachusetts, Minnesota, Mississippi, Oregon, Utah and Washington** do not permits sales of insurance products to residents outside of their state of residence, regardless of the circumstances or connection to the non-resident state. If a non-resident application is submitted for a resident of one of these states, we will decline the applicaiton.

In order for the Home office to document the appropriateness of non-resident solicitation, completion of this form is a requirement. You must describe the connection between the Owner and the non-resident state in which the sale took place. You may be asked to provide evidence that the Owner was in the non-resident state for reasons other than to transact insurance at thee time of solicitation.

**This is not an application form and does not become part of the contract. The issued annuity contract must be delivered in the same state in which the application was solicited. It may not be mailed to the customer's home address.**

## 1. OWNER INFORMATION

Name of Owner:	Application Date:
Annuity Premium:	State of Solicitation:

## 2. REASONS FOR SOLICITATION OUTSIDE STATE OF RESIDENCE

Second Home	City	State
Place of Employment	City	State
Owner has Regular Business Dealings in the State	Location(s)	How often
Describe:		
Other	Location(s)	How often
Describe:		

## 3. ACKNOWLEDGMENTS

We certify that (check all that apply):

The above information is true and complete;

The solicitation and sale of the product and the signing of the application occurred solely within the state identified in the application.

The contract will be delivered to the Owner in the same state.

I understand that the solicitation for this Policy and Contract occurred in the application state and that the laws of the application state will govern all legal rights and obligations under the policy/contract applied for.

Owner Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Agent Signature: \_\_\_\_\_

Date: \_\_\_\_\_