

AUTHORIZATION FOR ANNUITY WITHDRAWAL

Contract Number: \_\_\_\_\_ Contract Owner: \_\_\_\_\_

I authorize a withdrawal from my annuity contract equal to: (Select One) (All options not available for all contracts)

- 10% of the previous year's account balance / or the penalty free amount under my contract. (Paper Check)
Fixed amount of \$ \_\_\_\_\_ Net Amount \$ \_\_\_\_\_. (Paper Check)
Monthly Interest as earned, if available. (Paper Check or Direct Deposit)
Fixed amount of \$ \_\_\_\_\_ per month. I understand this option will terminate upon my next contract anniversary and I will need to contact the company in order to continue this option. (Qualified accounts only)

ROTH IRA ONLY - Have 5 years passed since the year for which you made your first regular or conversion contribution to any ROTH IRA (including ROTH IRAs with any other financial Organization)? Yes No

I hereby authorize systematic credit entries to the account in the Depository Institution named below, and I authorize this depository institution to accept entries to the account. If funds to which I am not entitled are deposited to this account, I authorize you to direct the bank to return said funds. (Available for systematic monthly payments only)

Depository Institution: \_\_\_\_\_

Please specify account type: Checking Account Savings Account

Name on Account: \_\_\_\_\_

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_ (Please include a voided check)

IMPORTANT TAXPAYER INFORMATION

I understand that if there is a reportable distribution due to the withdrawal, it will be reported to the Internal Revenue Service (IRS) for the calendar year the withdrawal is made. Unless waived by me, if there is a reportable distribution, it will have income tax withheld at a flat rate of 10%. If I am under the age of 59 1/2, an IRS Federal Excise Tax may apply to the withdrawal. State income tax withholding is mandatory in CT and DC, and mandatory if younger than age 59 1/2 in MS and NE. State income tax may not be withheld in AK, FL, HI, NH, NV, SD, TN, TX, WA, and WY. Otherwise, state income tax withholding is voluntary with the following exceptions: mandatory with federal in DE, IA, ME, MA, and OK; mandatory with federal unless waived in CA and NC, and mandatory unless waived in AR, KS, MI, OR, and VT. I further understand that even if I elect not to have Federal Income Tax withheld, any reportable distribution will be reported to the IRS.

TAX WITHHOLDING ELECTION (Please Check)

- I do NOT elect to have taxes withheld from my payments.
I DO elect to have federal income taxes withheld in the amount of \$ \_\_\_\_\_ or percentage of \_\_\_\_%.
I DO elect to have state income taxes withheld in the amount of \$ \_\_\_\_\_ or percentage of \_\_\_\_%.

NOTE: TAX AUTOMATICALLY WITHHELD IF WITHHOLDING OPTION NOT ELECTED

The following statement is required by the IRS: Under penalty of perjury, I certify that the number shown on this form is my correct social security or taxpayer ID number and I am not subject to back-up withholding. I certify that I am not under guardianship, nor have I made any assignment, pledge, or executed any document affecting ownership or right to any monies due or to become due under this contract, and further that no proceedings in bankruptcy are pending to which I am a party.

This form dated at \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.
City/State

Signature of Owner(s) (if Joint - both must sign) Owner's Social Security Number or Taxpayer ID Number Owner's Telephone Number

Signature of Witness\* Telephone Number of Witness Assignee Signature (if applicable)

\* Signature must be witnessed by an adult who is not a Beneficiary or Owner. In the following states, the signature of your spouse must also be present: AK, AZ, CA, ID, LA, NM, NV, TX, WA, WI.