

INSTRUCTIONS FOR COMPLETION OF BENEFICIARY STATEMENT AND PAYMENT OPTION ELECTION FORM

FILLING OUT THE BENEFICIARY STATEMENT

- x Complete sections A and B in full.
- x If a Payment Contract is selected in item C1 of the Beneficiary Statement, complete Payment Option Election Form (431-205).
- x A Change of Name option in item C3 may only be used in cases where a spouse is beneficiary of an Annuity policy.
 - o Also complete Beneficiary Designation Form 433-64.
- x Complete Section D only if the claim is submitted under an Annuity policy.
- x Read Sections E carefully.
- x Sign on page 4 and provide additional information, as required. Beneficiary retains pages 5 and 6.

WHO SHOULD COMPLETE THE BENEFICIARY STATEMENT AND WHAT IS REQUIRED?

- x One Beneficiary, multiple policies: One form may be used for multiple policies, unless a different Method of Payment is desired for each policy.
- x If a Beneficiary has predeceased the insured: We will need a copy of the death certificate for the deceased Beneficiary.
- x If proceeds are payable to a minor child: The legally appointed conservator(s) for the minor must complete this form and a certified copy of the appointment of conservatorship is required. The social security number in item B4 should be that of the minor child.
- x If proceeds are payable to an estate: The appointed legal representative(s) of the estate should each complete the form. A certified copy of the court appointment is required. If required

BENEFICIARY STATEMENT

- x Please print clearly when completing this form.
- x Answer all questions.
- x If there is more than one Beneficiary, we require a separate Beneficiary Statement signed by each Beneficiary.
- x Please attach a Certified Copy of the Death Certificate to one Beneficiary Statement.
- x Signature required on Page 4.

A. INFORMATION ABOUT THE DECEDENT

1. Name of deceased _____ Date of Birth _____

Insured: _____

Policy #: _____

Insured:

Insured: _____

Policy #: _____

Beneficiary Name: _____

TERMS AND CONDITIONS

Client Copy