

ANNUITY SERVICE REQUEST

Aurora National Life Assurance Company, NAIC 61182, 1275 Sandusky Rd., Jacksonville, IL 62650 • Telephone (800) 265-2652

INSTRUCTIONS: The Annuity Owner may use this form to request action by the Company. Check the appropriate squares and supply information indicated. **To prevent delay, please obtain signature guarantee or notarization.**

For assistance, please contact the Annuity Department at (800) 265-2652.

DATE	DATE			ANNUITANT NAME				OWNER(S) NAME				
ANNUTIY NUMBER			OWNER'S DATE OF BIRTH				OWNER'S SOCIAL SECURITY OR TAX ID NUMBER					
	uest and	direct the C	Company	to <u>change</u>	e this Annuity	as follow	vs:					
Owner's Address	Change	STREET ADDR	RESS									
Address	address to:	CITY						STATE	ZIP COD	ZIP CODE		
Primary Beneficiary	NEW PRIMARY BENEFICIARY'S NAME DATE OF BIRTH OR DATE OF TRUST							RELATIONSHIP TO ANNUITANT				
	ADDRESS			CITY				STATE	ZIP CODE			
Contingent Beneficiary	NEW CONTINGENT BENEFICIARY'S NAME			DATE OF BIRTH OR DATE OF TRUST				RELATIONSHIP TO ANNUITANT				
	ADDRESS			CITY				STATE	ZIP CODE			
Primary Owner	NEW OWNER'S NAME (See Additional Instructions)											
	ADDRESS				CITY			STATE	ZIP COD	ZIP CODE		
	SOCIAL SECURITY OR TAX ID NUMBER				DATE OF BIRTH OR DATE OF TRUST			TELEPHONE NO.				
	SPOUSAL JOINT OWNER (With rights of survivorship unless otherwise stated) SPOUSAL JOINT C						JOINT OWN	WNER SOC. SEC. NO.				
	NEW OWNER(S) OR TRUSTEE(S) SIGNATURE (Must be notarized) X SPOUSAL JOINT ON						JOINT OWN	WNER DATE OF BIRTH (MM/DD/YYYY)				
Contingent	NEW CONTIN	GENT OWNER'S	S NAME			ı						
Owner	ADDRESS				CITY			STATE	ZIP CO	DE		
	SOCIAL SECURITY OR TAX ID NUMBER				DATE OF BIRTH OR DATE OF TRUST			TELEPHONE NO. (optional)				
Legal Name Change	CHANGE NAME OF											
	□ Annuitant □ Owner □ Payee □ Contingent Annuitant □ Contingent Owner											
	☐ Primary Beneficiary ☐ Contingent Beneficiary CHANGE NAME FROM: TO:											
	REASON FOR CHANGE N				EW SIGNATURE (Submit legal proof- I.e., marriage certificate, to facilitate processing)							
FOR DEFE												
Deferral					Annuitant's age 85) Y) or AGE	_						
Contingent	NEW CONTINGENT ANNUITANT'S NAME (Must be Individual)							Gender				
Annuitant	ADDRESS				CITY			STATE	ZIP CODE	Female		
	SOCIAL SECURITY OR TAX ID NUMBER				DATE OF BIRTH (MM/DD/YY)			TELEPHONE NO.				
FOR IMME	DIATE AI	NNUITIES	ONLY									
Payee	PAYEE NAME							SOCIAL SECURITY NUMBER				
	ADDRESS				CITY			STATE	ZIP CODE			
	FOR DIRECT DEPOSIT ONLY: BANK NAME							ACCOUNT NUMBER				
	BANK ADDRESS				CITY			STATE	ZIP CODE			
	i .				i				1			
Withholding					IMMEDIATE ANNUIT							

SIGNATURES REQUIRED on page 2

INSTRUCTIONS

<u>X</u>	X
OWNER(S) SIGNATURE (Required for any of the above changes	s) SPOUSAL JOINT OWNER SIGNATURE (If applicable)
OWNER(\$) TELEPHONE NUMBER	
	NOTARIAL ACKNOWLEDGMENT
State of)
) ss.
County of)
On, 20befo	ore me, Notary
	poreonally known to mo (or
Public, personally appeared	personally known to me (or
Public, personally appearedproved to me on the basis of satisfactory evidence t	to be the person(s) whose name(s) is/are subscribed
Public, personally appeared	to be the person(s) whose name(s) is/are subscribed nat he/she/they executed the same in his/her/their

ADDITIONAL INSTRUCTIONS

- 1. After completing the date, annuitant name, owner name and annuity number, complete ONLY those sections you wish to change. Complete one form for every annuity number.
- 2. If space provided on the form is not adequate, provide additional information on a separate sheet, dated and signed by the Owner(s).
- 3. **Delete** To delete a designation, check the appropriate box and write "DELETE" in the area provided for name.
- 4. **Address** In this area indicate permanent changes of the Owner's address only. If the change has not yet occurred, please indicate the date the new address will be effective.
- 5. **Contingent Annuitant** If the annuitant's age was over 72 at issue, the contingent annuitant may be changed but not deleted on a deferred annuity.
- 6. **Change of Owner** If a change of owner(s) is requested, both the current owner and new owner signatures must be present. The new owner's signature must be notarized or signature guaranteed. The new owner must also complete the box titled "Withholding" for an immediate annuity.
- 7. If the annuity was purchased with tax-qualified money (IRA, pension plans, etc.), the contingent annuitant and contingent owner designations are not available.
- 8. **Second-Party Owner** If the signature of the owner is by a second party, supporting legal documentation should be attached (i.e., certified Letters of Guardianship, certified Power of Attorney, etc.)
- 9. **Death of Owner** If the Owner change is being requested because of the death of current Owner, attach a certified copy of the death certificate. If no contingent owner was previously designated, contact the company for additional requirements.
- 10. **Payee** Complete the Payee section only if checks are to be directed to a party other than the one currently receiving them. For your information, the owner will be responsible for reporting any taxable income.
- 11. **Withholding** You may change your election at any time by notifying the company in writing. Withholding will only apply to the portion of each payment that is included in your gross income and subject to Federal income tax. If you elect withholding or leave this \$ection blank, we will assume you have a spouse and three dependents as required by law, unless you submit a completed IRS form W-4P. An election for Federal income tax will be considered an election for state income tax unless otherwise indicated.