

**Regular Mail**

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**Overnight Delivery**

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**Phone:** 877.446.6020

**Website:** www.nslac.com

**Ownership Change Request**

**Annuity Contract Number(s):** \_\_\_\_\_

**Annuitant Name:** \_\_\_\_\_

**Owner Name:** \_\_\_\_\_

**Important**

A Transfer of ownership from the current Owner of the above-referenced contract to the new Owner(s) shown below is permissible pursuant to the terms and conditions of the contract with regard to insurable interest. The undersigned Owner(s) warrant(s) that he or she has the right to transfer the ownership of the contract and that no proceedings in bankruptcy or insolvency, voluntary or involuntary, have been instituted by or against him/her and he/she is not under guardianship or any legal disability.

**NOTE:** This change in ownership **may be considered a taxable distribution**. Consult your personal tax advisor on all tax matters.

**NOTE:** Changing the ownership **will terminate** any systematic withdrawal that is currently processing on this contract.

**New Primary Owner**

Complete all information below for the **new primary owner**.

**NOTE:** To updated beneficiary information with this ownership change, the new Owner must complete a Beneficiary Change Request (form V-4614-NSLAC)

Owner Name (print): \_\_\_\_\_

SSN  TIN \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Annuitant/Owner: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**New Joint or Successor Owner**

Complete all information below for the **new joint or successor Owner**.

**NOTE:** Joint Trustee or Successor Trustee information should not be provided in this section unless that individual is also being added to the contract as a Joint or Successor Owner.

Select one:

New Joint Owner

New Successor Owner

Owner Name (print): \_\_\_\_\_

SSN  TIN \_\_\_\_\_

Address: \_\_\_\_\_

Relationship to Annuitant/Owner: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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## Additional Changes

### Change of Name

You must submit proof of the name change (e.g., Court Documents, Driver's License, Divorce Decree)

Former name: \_\_\_\_\_

New Name: \_\_\_\_\_

### Date of Birth Correction

Proof of birth may be required to complete this change.

From: \_\_\_\_\_

To: \_\_\_\_\_

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## Tax Certification

Under penalties of perjury, I certify all of the following:

1. The number shown on this form is my correct identification number (or I am waiting for a number to be issued to me,) and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3.
  - a. I am a U.S. citizen or U.S. resident alien, as indicated above, or
  - b. A partnership, corporation, company or organization created or organized in the United States under laws of the United States, or
  - c. An estate (other than a foreign estate,) or
  - d. A domestic trust (as designed under Regulations section 301.7701-7,) and
4. I am exempt from FATCA reporting.

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## Signatures

\_\_\_\_\_  
Signature\* of Current Owner\*\*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature\* of New Owner\*\*

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature\* of Joint Owner\*\* (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature\* of New Joint Owner/Successor Owner\*\* (if applicable)

\_\_\_\_\_  
Date

\*Signer must be an authorized member or stated on the Custodian's Corporate Resolution.

\*\***Certification:** I hereby certify that I, the above-signed, am the owner of this annuity contract or, if the contract is trust, custodial, corporate or partnership owned, that I am an authorized signatory thereof and that this request is being submitted in my capacity as an authorized signatory of the trust, custodial account, corporation or partnership. The above-signed hereby agrees, for ourselves, and, if any, our subsidiaries, agents, employees and directors at all times to indemnify and hold harmless National Security Life and Annuity Company, each of its subsidiaries, agents, employees and directors against any and all claims, liabilities, damages, demands, actions, controversies, charges, expenses and losses sustained or incurred by National Security's actions in making the change requested above and release the same from any liability arising from the execution of this transaction.

