



Administrative Office:  
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## Individual Annuity Contract Change Request – Full Surrender

Please Print

Contract Number	Annuitant	Owner
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Please complete all sections.

### Section 1 – Full Surrender

I understand that, by signing this form, I am requesting my annuity contract to be surrendered in full. The original contract is attached or, if not attached, I attest that I have done a diligent search and cannot find the contract. I agree that if the contract shall be found at a later date, it will be returned to the Company. I also agree, jointly and severally on behalf of my heirs, successors, and assignees, to indemnify the Company from any and all claims, suits, costs, or expenses to which it may be subjected or in any way made liable in consequence of the Company's compliance with the provisions of the original contract without its delivery to the Company.

**Please be aware that the surrender in full of this contract may be subject to a surrender (contingent deferred sales) charge. In addition to any applicable surrender charge, there may also be additional rider or contract fees deducted from the distribution. Please refer to your contract or rider for specific charges associated with the termination of your contract.**

### Section 2 –Taxation

Federal Taxation: If you do not select an option below, we are required to withhold at least 10% of the taxable amount.

- I DO NOT want to have federal income tax withheld from my withdrawal.
- I DO want to have \_\_\_\_\_ % federal income tax withheld from my withdrawal (must be less than 100%).

State Taxation: We will withhold state income tax on the taxable amount if: (1) you specifically request that we do so on this form and we are able to do so for your state; or (2) we are required to do so under state law. If you have questions regarding mandatory state withholding, please contact our Annuity Product Specialists at 877.446.6020.

- I DO NOT want to have state income tax withheld from my withdrawal.
- I DO want to have \_\_\_\_\_ % state income tax withheld from my withdrawal.

*Other federal or state withholding rules may apply to your withdrawal.*

I understand that I am liable for payment of federal and state income tax on any taxable portion of the requested payment and could be subject to tax penalties under the estimated tax payment rules if payments are not adequate.

### Section 3 – Method of Disbursement (Please check one)

- Check** (Unless otherwise indicated, all checks will be sent via regular U.S. mail).
- Wire Transfer** (There is a \$25 fee to wire funds and your financial institution may also charge a fee for incoming wire transfers.)
- Electronic Funds Transfer (EFT)** - Please complete the below agreement. A voided check or a copy of a voided check must be attached in order for us to process the withdrawal. There may be maximum distribution limits for EFT; please contact Annuity Product Specialists at 877.446.6020 for more information. EFT may not be an option for custodial-owned contracts.

**PLEASE COMPLETE ALL PAGES OF THIS FORM AND SIGN.**



\*\*\* Under the penalties of perjury, I certify that the information provided on this form is true, correct, and complete. I have not been notified by the Internal Revenue Service that I am subject to withholding for under-reporting under Section 3406(a)(1)(c). I am a U.S. citizen or a U.S. resident alien.

Payment must be made to the contract owner(s). National Security is unable to pay or direct deposit to a third-party account.