

NSS LIFE Annuity Applications

Annuity Application Forms:

AA-05 Annuity Application approved for use only in the following states:

CA – California
CO – Colorado
CT – Connecticut
IL – Illinois
IN – Indiana
MI – Michigan
WV – West Virginia

AA-05-FL Annuity Application approved for use only in the following states:

FL - Florida

AL Annuity Application approved for use only in the following states:

NJ - New Jersey

ALL (04-02) NY Annuity Application approved for use only in the following states:

NY - New York

ALL (04-02) OH Annuity Application approved for use only in the following states:

OH - Ohio

ALL (04-02) PA Annuity Application approved for use only in the following states:

PA - Pennsylvania

ALL (04-02) R Annuity Receipt: All thirteen states the National Slovak Society is licensed. Licensed states include:

CA – California
CO – Colorado
CT – Connecticut
FL - Florida
IL – Illinois
IN – Indiana
MI – Michigan
NJ - New Jersey
NY - New York
OH – Ohio
PA – Pennsylvania
WV – West Virginia
WI - Wisconsin.

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Annuity Application Instructions:

Assembly/ Circle #: Completed by Home Office Staff.

Certificate #: Completed by Home Office Staff.

Question 1 – 3: Proposed Annuitant personal information, all questions **must be answered - Required.**

Question 4: Select between Preferred 5 or Preferred 8 Plans - **Required.**

Immediate Settled Annuity (if this is the purpose of application, each of the following options are required input)

- Maturity Age: Used only for an Immediate Settled Annuity.
- Must provide Proposed Annuitant's (Maturity Age) which determines the dollar amount of distribution.
- Select one of the following settlement options Life or Life & Certain. If selecting Life & Certain select the 5, 10, 15 or 20 year settlement option.
- First Premium:
- Mode: Frequency of distribution of funds to Proposed Annuitant.

Flexible Deferred Annuity

a: If the applicant desires a "Reminder Notice", select either No or Yes. If yes, record the desired dollar amount and the frequency of the Notice Reminder, options are Annual, Semi-Annual or Quarterly.

b: Designate if this is a Non-Qualified or Qualified Annuity - **Required.** If plan is Qualified, it is **Required to select** one of the following plans: Traditional IRA, Roth IRA, SEP or 403(b).

c: Amount Paid with Application, record dollar amount accompanying this application - **Required.** If there is a rollover from another financial institution, indicate the anticipated amount **Required.**

Question 5: **Only used when the Applicant signing this application is an entity other than the proposed annuitant (Trustee).**

Question 6: Beneficiary, list all requested beneficiaries and/or contingent, completing each field. Share: indicate percentage based on 100%. *Example: Robert Jones, Share: 75% and Elizabeth Jones, Share: 25%.* - **Required.**

Question 7: As stated respond no or yes, if yes state insurer and policy number - **Required.**

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- Question 8: Respond yes or no to existing National Slovak Society membership. If response is no, application for annuity will not be processed without completed "Membership Application". - **Required.**
- Insure that the proposed annuitant reads and understand the section "The undersigned"
- Signed at: indicates the actual City, State and date where and when application is taken and completed with agent. - **Required.**
- Signature of the Proposed Annuitant is **required**, if an "Owner" exists, said owner must sign as Applicant.
- If the Proposed Annuitant is under 16 years of age, an **adult must sign** the application on the Member/Adult Signature line.
- Witness signature **can not be the annuitant or beneficiary.** - **Required.**

Agent's Statement: **All questions must be answered and legible.**

Annuity Receipt Instructions:

- Received From: Name of Proposed Annuitant or the Proposed Owner of Annuity that completes application and presents monies.
- The sum of: Amount of check received. - **Required.**
- Receipt for: Name of Proposed Annuitant. - **Required.**
- Date: Date money received. - **Required.**
- Agent: Agent's signature and Agent Number. - **Required.**