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.
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:

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**.
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.