



REQUEST TO CHANGE FROM LIFE TO ANNUITY PLAN

Assembly/Circle # _____

Number(s) _____

Of Certificate(s) _____

Being Changed _____

YOUR LIFE CERTIFICATE BEING CHANGED MUST BE ATTACHED

I, _____ do hereby request and direct that the above Life Insurance certificate(s) be
(Members Name)

changed to one of the following annuity plans: _____

- | | | |
|-------------------------------------------------------|-------------------------------------------------------|----------------------------------------|
| <input type="checkbox"/> Preferred 5 Deferred Annuity | <input type="checkbox"/> Preferred 8 Deferred Annuity | <input type="checkbox"/> OptimumChoice |
| <input type="checkbox"/> Preferred 5 IRA, SEP, TSA | <input type="checkbox"/> Preferred 8 IRA, SEP, TSA | |
| <input type="checkbox"/> Preferred 5 Roth IRA | <input type="checkbox"/> Preferred 8 Roth IRA | |
| <input type="checkbox"/> Preferred 5 Coverdell ESA | <input type="checkbox"/> Preferred 8 Coverdell ESA | |

New Certificate #(s): _____

I fully understand and agree that the benefit due my beneficiary(ies), should death occur, will be paid in accordance with the terms of my certificate(s) to be used in this instance.

Birthdate / / Current Age Social Security Number - - () -
Month Day Year r

Additional amount remitted with this request \$ _____ Total \$ _____

Primary Beneficiary(ies)

_____	Name	_____	Relationship
_____	Address	_____	
_____	Name	_____	Relationship
_____	Address	_____	

Contingent Beneficiary(ies)

_____	Name	_____	Relationship
_____	Address	_____	
_____	Name	_____	Relationship
_____	Address	_____	

Approved By:

Member Information:

_____	_____ / _____ / 20 Month Day Year
National President	_____
_____	Witness
National Secretary-Treasurer	Agent

_____	Member Signature
_____	Address
_____	City State Zip Code