

## POLICY OWNER SERVICE REQUEST

JOINT POLICY	<input type="checkbox"/> YES	<input type="checkbox"/> NO
POLICY NUMBER _____	INSURED _____	
POLICY OWNER _____	POLICY OWNER DOB _____	
POLICY OWNER _____	POLICY OWNER DOB _____	
POLICY OWNER _____	POLICY OWNER DOB _____	
AGENT _____	POLICY OWNER PHONE NUMBER _____	

CHECK AND COMPLETE THE APPROPRIATE ITEM(S). SIGN AND DATE ON THE REVERSE SIDE

1. NAME CHANGE OR CORRECTION
- Insured       Owner       Beneficiary       Payor
- Name of the above should be changed in the company records from \_\_\_\_\_ to \_\_\_\_\_
- Reason: \_\_\_\_\_
- (If reason for change is other than marriage, provide copy of legal documentation.)
2. ADDRESS CHANGE OR CORRECTION
- Insured       Owner       Beneficiary       Payor       Trust       Sole Proprietorship
- Corporation       Charity/Non-Profit       LLC       Partnership
- New Address \_\_\_\_\_
3. CHANGE MODE OF PREMIUM PAYMENT TO
- Annual       Semiannual       Quarterly       PAC Monthly       Other
- \*Authorization form needed to request monthly electronic draft. Complete the Electronic Authorization Form and provide with this request.
4. CHANGED PLANNED PREMIUM
- Change planned modal premium from \_\_\_\_\_ to \_\_\_\_\_
- \*USFL recommends an inforce illustration prior to decreasing premium on a Universal Life product.
5. POLICY LOAN
- Net amount of \$ \_\_\_\_\_
- Gross amount of \$ \_\_\_\_\_
- Maximum amount allowable
- \* If policy is assigned, you must include assignee's signature for loans, withdrawals and surrenders**
6. PARTIAL WITHDRAWAL
- A partial withdrawal is hereby requested in the amount of \$ \_\_\_\_\_.
- This is subject to the limits stated in your policy. A withdrawal fee may apply.

7. POLICY SURRENDER (submit policy)

The cash surrender value is hereby requested and will be accepted in full payment and release of all claims under the policy. I/we hereby declare that no bankruptcy, divorce, or separation proceedings, attachments, tax or other lien is pending against me/us. If policy is lost, please check lost policy statement below.

**Life Insurance is a critical part of a broader financial plan. There are many options available, and you have the right to shop around and seek advice from different financial advisers in order to find the option best suited to your needs.**

8. TAX WITHHOLDING

This distribution may be subject to federal and state taxation. Please complete the following withholding election:

**Please be advised:** Due to IRS implementation of the Foreign Account Tax Compliance Act (FATCA), taxable disbursements made to entity (business, trust or estate) owners/payees may be subject to 30% withholding if proper documentation is not on file. Proper documentation is considered to be a properly completed and signed IRS Form W-9 for domestic entities. Foreign entities are expected to submit a properly completed and correct type of IRS Form W-8. In the event proper documentation is not on file with USFL we will withhold the required 30% upon disbursement. For further details regarding the FATCA rules and regulations and how disbursements may be affected, please contact your tax advisor.

Yes, withhold taxes from my distribution (10% unless otherwise indicated).

No, do not withhold taxes from my distribution.

**RIGHTSHOLDER'S (OWNER'S) TAXPAYOR ID OR SOCIAL SECURITY NUMBER:** \_\_\_\_\_

**UNDER PENALTIES OF PERJURY, I CERTIFY THAT (i) THE NUMBER SHOWN ON THIS FORM IS MY CORRECT TAXPAYOR IDENTIFICATION NUMBER, AND (ii) 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 OR (c) THE IRS HAS NOTIFIED ME THAT I AM NO LONGER SUBJECT TO BACKUP WITHHOLDING AND (iii) I AM A U.S. PERSON (INCLUDING A U.S. RESIDENT ALIEN).**

**CERTIFICATION INSTRUCTIONS:** You must cross item (ii) above if you have been notified by the Internal Revenue Service that you are currently subject to backup withholding because of under-reporting interest or dividends on your tax return.

**THE INTERNAL REVENUE SERVICE DOES NOT REQUIRE YOUR CONSENT TO ANY PROVISIONS OF THIS DOCUMENT OTHER THAN THE CERTIFICATIONS REQUIRED TO AVOID BACKUP WITHHOLDING.**

9. LOST POLICY STATEMENT/DUPLICATE POLICY

I declare the above policy has been lost or misplaced and request the company to issue a document describing the terms of the policy. I agree to return this document if the original policy is found.

**Medallion Signature Guarantee:** (Please Place Stamp Below)

If the amount being withdrawn is \$250,000 or more, we will require a medallion signature guarantee. We may also require a medallion signature guarantee in other circumstances. You may obtain a medallion signature guarantee at most banking institutions.

A medallion signature guarantee may NOT be obtained by a notary public.

Dated At \_\_\_\_\_  
City State

X \_\_\_\_\_  
Signature of Insured

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Witness

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Assignee

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Owner

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Owner

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Owner

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Owner

Entity Name \_\_\_\_\_

Title of the person signing \_\_\_\_\_

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of person signing behalf of Entity

Date \_\_\_\_\_

X \_\_\_\_\_  
Signature of Irrevocable Beneficiary