

Questions? Call our National Service Center at 1-800-888-2461.

Instructions

Generally, annuities should not be solicited or purchased outside the state where the Applicant resides. However, in some cases an Applicant may be able to complete and sign an application for an annuity in a state other than the one in which he/she resides. Such transactions may be proper when the Applicant has a significant connection to the non-resident state, such as a second home, place of employment, or regular business dealings that brings the Applicant to the non-resident state for purposes other than to purchase an annuity.

In order for Security Benefit to determine the appropriateness of a non-resident annuity purchase, please complete this form whenever an Applicant applies for a Security Benefit annuity in a state that is not the Applicant's resident state.

Please note: non-resident sales are not allowed to residents of Idaho, Minnesota, New York, Utah, and certain products in Iowa.

This form is not an application form and does not become a part of the contract. Security Benefit reserves the right to decline to issue the annuity contract for which the Applicant is applying.

1. Provide Owner Information

Name of Applicant _____
First MI Last

Social Security Number/Tax I.D. Number _____ **Application Date** _____
(mm/dd/yyyy)

Annuity Product _____ **Amount of Annuity Premium** _____

State of Residence _____ **State of Solicitation** _____

Reason(s) for Solicitation Outside Applicant's State of Residence:

☐ **Second Home** **Address** _____
Street Address

City State Zip Code

☐ **Place of Employment** **Name** _____
Address _____
Street Address

City State Zip Code

☐ **Other (subject to Security Benefit approval)**
 Please describe in detail, including frequency and location _____

2. Provide Signatures

By signing below, the Applicant(s) and Producer certify that:

- ☐ the above information is true and complete
- ☐ the solicitation and sale of the product and the signing of the application occurred solely within the state identified on the application;
- ☐ the contract will be delivered to the owner in the same state where the sale occurred.

Please be advised that if any of the boxes in this section are left unchecked, the application will be deemed not in good order and a contract will not be issued.

If the Producer maintains an office in the non-resident state, please provide the address:

Street Address

City State Zip Code

X _____
Signature of Applicant(s) Date (mm/dd/yyyy)

(You must include your designation if signing as a trustee, executor, custodian, guardian, or attorney-in-fact.)

X _____
Signature of Producer Date (mm/dd/yyyy)

