Security Benefit®

Non-Resident Information Form

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.

Please complete this form whenever an Applicant applies for a Security Benefit annuity in a state that is not the Applicant's resident state. Each state has jurisdiction and regulations governing insurance product approvals, insurance producer licensing, and solicitation to purchase insurance products. The producer should advise the owner/applicant of any differences between the product as approved in the owner/applicant state of residence and the product as approved in the state of solicitation, sale and delivery.

Security Benefit reserves the right to decline to issue the annuity contract for which the Applicant is applying.

1. Provide Owner/Joint Owner Information

Name of Owner _____ (First) _____ (MI) _____ (Last)

Name of Joint Owner _____ (First) _____ (MI) _____ (Last)

Annuity Product _____

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

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

2. Signatures

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

- Sufficient nexus exists between an applicant/owner and the non-resident state in which the the solicitation and sale has taken place and includes one or more of the following reasons:
  - A second home in the non-resident state
  - A business owned by the customer in the non-resident state
  - Current or former employment in the non-resident state
  - Regular financial business dealings in the non-resident state (this is includes banking, CPA, Attorney, or other financial related business)
  - Former residence in the non-resident state
- The solicitation, application and delivery of the contract, are all occurring in the state of solicitation.
- We understand the contract that is being applied for will be governed by the insurance regulations of the state where the application was signed.

Please be advised that if the sale does not meet the requirements above, the application should not be submitted for processing or issuance.

X _____ Signature of Owner | _____ Date (mm/dd/yyyy) | _____ (You must include your designation if signing as a trustee, executor, custodian, guardian, or attorney-in-fact.)

X _____ Signature of Joint Owner | _____ 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)