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Surrender Partial Withdrawal Request Form

SURRENDER/PARTIAL WITHDRAWAL REQUEST FORM PAGE 12

IRDA REGN. NO. 142 The information on this form and to the best of my/our knowledge and belief the certification is true, correct and that the Company is relying on this information. I/We understand that the Company is not able to offer any tax advice on CRS/FATCA or its impact.

SURRENDER/PARTIAL WITHDRAWAL REQUEST FORM

Request for Partial Withdrawal or Surrender for Annuity Contracts (This form may not be used to request a withdrawal

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from any VISTA Index Annuity Contracts.) Please mark the appropriate box for each change or service you are requesting. Please print the requested information. All partial withdrawal and surrender proceeds will be made payable to the Owner of record and mailed

Request for Partial Withdrawal or Surrender for Annuity

...

1. The cash value is payable at the Service Office of the Company in Kansas City, Missouri (PO BOX 410288, Kansas City, MO 64141-0288), and only in exchange for the policy and the executed Surrender/Withdrawal request. 2.

Request for Full or Partial Surrender Form

Hereby confirm that I have personally discussed with the above PH over surrender/withdrawal request regarding the mentioned policy & benefits of the policy explained in detail. The Customer

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is willing to: Continue with the policy by canceling the Surrender/Withdrawal request, Opt for Partial Withdrawal from the Policy, instead of Surrender ,

Surrender/Partial Withdrawal Request Form

PARTIAL SURRENDER REQUEST First Name MI Last Name
Contract Number: 6773Y \$2 01 67 73Y REV 03/05 To be completed for partial surrenders. For questions, please contact the Midland National Customer Service Department. Phone: 877-586-0244 Fax: 877-586-0249

PARTIAL SURRENDER REQUEST - fpgi.us

Withdrawal/Surrender Request Form 5228-AIL 2/20 Our withdrawal/surrender request form has some sections that are only applicable to certain tax qualifications. Before completing the form, you should verify the tax qualification of your contract (e.g. 403(b), 457(b) or IRA) by visiting our website: Log into your

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account at GAIgannuities.com

Tips For Completing The Withdrawal/Surrender Request Form

mentioned plans, the request must be before 230pm for same working day fund price. 3. Your partial withdrawal request is subject to minimum withdrawal amount and minimum account balance. Page 2 of 4 3. I WISH TO WITHDRAW OR SURRENDER MY POLICY BECAUSE OF: 4. WITHDRAW FUNDS FROM MY POLICY 5.

Request for Partial/ Full Withdrawal & Policy Surrender

Full or Partial Surrender Request Form Alternatives to cancelling your bond Your bond offers alternatives to cancelling, for example a partial surrender of monies. If you would like to discuss any options available to you, please contact your financial adviser or call us on 0370 909 6010.

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Full or Partial Surrender Request Form

Use this form to request a withdrawal under the provisions of your annuity contract. Do not use this form to request a rollover, transfer, or exchange to another company. Please follow instructions to avoid delays in processing your request. A distribution is a tax reportable event that may not be reversed.

FULL OR PARTIAL WITHDRAWAL REQUEST INSTRUCTIONS FIXED ...

American Equity's Customer Service Forms . American Equity is committed to excellent customer service and provides our clients and agents easy access to preview, download, or email the necessary forms for your annuity contract needs. We thank you for your business.

American Equity Customer Service Forms

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Partial Withdrawal Form : The contract owner can complete this form to request a one-time partial withdrawal from an annuity. For contract limitations, rider effects or assistance filling out this form, please call the Annuity Product Specialist Team at 888-925-6446. This form may be returned via mail, email or fax. V-4619.3-B: EFT / Bank Deposit Form

Individual annuity forms - Ohio National Financial Services

Individual Annuity Contract Change Request – Partial Surrender. Form V-4619.3-B Rev. 8-17 Must complete and return all pages Page 1 of 3. This form may be faxed to 513.794.4730. Individual Annuity Contract Change Request – Partial Surrender. Please Print.

Individual Annuity Contract Change Request – Partial Surrender

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A library of forms in support of MassMutual products and services offered. From Beneficiary Change Request to Application for Policy Loan, you should find the forms you need here.

Forms | MassMutual

Withdrawal Request Forms. TSA Contract Loan Agreement; Requests for Systematic Withdrawals Package; TSA Systematic Withdrawal Package; TSA Partial withdrawal or Surrender Form; Partial Withdrawal or Surrender Form; Annuity Substantially Equal Periodic Payment(s) Required Minimum Distribution (RMD) Form; Make an IRA Qualified Charitable Distribution

Service Forms - Athene

America (Allianz) contract, your requested surrender/withdrawal may impact your RMD payments. • Withdrawals can only be made payable and sent to the contract owner or financial

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institution for benefit of the contract owner. • A new withdrawal form is required with each request. Original forms cannot be modified and resubmitted.

Withdrawals from annuity contracts - Allianz Life

Download service forms, which allows you to request certain changes or transactions on the New York Life products you own. Who We Are For 175 years, people have worked with New York Life to protect their families and futures.

Service forms library | New York Life

Please note: The current surrender value is subject to change. The surrender value is calculated on the day that it is processed, and processing usually requires at least 30 days from the date the properly completed surrender request form and any other required documents are received by the Company in good order.

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ANNUITY SURRENDER REQUEST

Additional Service Forms for client/policyholder use are available on www.nsre.com . Get information on how to file a claim. Completed forms can be faxed to (321) 400-6316 or mailed to Nassau Re, PO Box 22012, Albany, NY 12201-2012.

Service Forms | Nassau - NSRE

Withdrawal Request Form (Qualified) pdf . Purpose of this form: Use this form to request a full surrender or a partial withdrawal from your qualified annuity contract. Download Instructions: 1. Right-click on the link above. 2. Select "File" & "Save As" 3. Select location on your computer and click "Save"

John Hancock Annuities - Withdrawal Request Form (Qualified)

ANNUITY WITHDRAWAL/SURRENDER FORM Please read all instructions carefully and complete all applicable sections of this

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form. A photocopy of a signed, government issued ID such as a driver's license; state ID or passport must be submitted with the completed form.

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