



LifeSecure Insurance Company

(Formerly Columbia Universal Life)
Administrative Office:

P. O. Box 19085 • Greenville, SC 29602-9085
2000 Wade Hampton Blvd • Greenville, SC 29615-1064
Telephone: 800-880-1370 • Fax: 864-609-3444

DISTRIBUTION REQUEST

PLEASE PRINT OR TYPE

BOTH PAGES OF THIS FORM MUST BE COMPLETED

Annuitant Name(s)

Owner Name(s)

Policy Number

☐ PARTIAL WITHDRAWAL

- ☐ I wish to withdraw the maximum free amount from my annuity contract.
- ☐ I wish to withdraw \$ _____ from my annuity contract. ☐ Gross or ☐ Net
- ☐ I wish to start a periodic payment to begin on _____ (mo/day/year)
- ☐ Interest or ☐ Specific amount of \$ _____
- Mode of payment: ☐ Monthly ☐ Quarterly ☐ Semi-Annual ☐ Annual
- ☐ I am aware that there may be an early withdrawal charge.

☐ REQUIRED MINIMUM DISTRIBUTION from a Qualified Account

If beneficiary is a spouse who is more than 10 years younger, please indicate date of birth: _____

Do you want automatic distribution? ☐ Yes ☐ No If Yes, indicate start date: _____

Mode of payment: ☐ Monthly ☐ Quarterly ☐ Semi-Annual ☐ Annual

Calculating the proper RMD in January of each year and dividing that amount by the number of payments determines the modal payment amount.

☐ SURRENDER

- ☐ I wish to surrender the policy for its Cash Surrender Value and am aware of any early surrender charges.
- The policy is:
- ☐ Enclosed
- ☐ Lost/Destroyed - I hereby declare under penalty of perjury that the above numbered policy has been lost or destroyed; that it has not been delivered to any person having any right, title or interest in it.

SEND FUNDS TO:

- ☐ Policy Owner's Mail Address
- ☐ Direct Deposit to Depository Shown Below

SPECIAL INSTRUCTIONS:

AUTHORIZATION FOR DIRECT DEPOSIT

I/we hereby authorize LifeSecure Insurance Company, hereinafter called the Company, to initiate credit and/or debit entries as adjustments for any credit entries made in error, to the account number shown below.

The depository named below, hereinafter called Depository, is hereby authorized to credit and/or debit the same to such account as indicated.

This agreement will remain in effect until the Company terminates it or until a written notice is received from me/us of its termination and the Company has sufficient time to act upon it. If, at any time my/our Depository changes, I/we will provide a new Authorization for Direct Deposit.

Depository Name and Branch

Account Number

Mail Address of Depository – City, State & Zip Code

Transit/ABA Number

Policy Owner Name

Joint Owner Name

X

Policy Owner Signature

Joint Owner Signature

Please Attach a Blank Voided Check

☒ **ELECTION FOR WITHHOLDING (Substitute W4P Form)**

Federal and some State laws make payments subject to withholding. The law requires that you be told three things:

1. You do not have to have any money withheld from your periodic payments.
2. After you have made a choice you can change it at any time by writing to us. Please allow 30 days for the change.
3. Even if you elect not to have income tax withheld, you are liable for payment of income tax on the taxable portion of your distribution. You also may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

CHECK FEDERAL AND/OR STATE (if applicable)

IF NOT CHECKED AND THE PAYMENT AMOUNT IS SUFFICIENT, WE ARE REQUIRED TO WITHHOLD INCOME TAX

FEDERAL:

☐ **WITHHOLD**

☐ 10% of taxable portion

☐ 20% of taxable portion

☐ Other (specify) _____

☐ **DO NOT WITHHOLD**

federal income tax from my distribution

STATE:

Not Applicable in Texas

☐ **WITHHOLD**

☐ % of taxable portion (specify) _____

☐ \$ of taxable portion (specify) _____

☐ **DO NOT WITHHOLD**

state income tax from my distribution

WE ARE REQUIRED TO WITHHOLD IF YOUR RESIDENT ADDRESS IS OUTSIDE OF THE UNITED STATES

☒ **SUBSTITUTE W-9 VERIFICATION (Box must be marked to qualify as a substitute W-9)**

Please consider this my substitute W-9. If you fail to furnish your correct TIN (taxpayer identification number), you may be subject to a \$50 penalty imposed by the Internal Revenue Service. In addition, in the event of such failure, 31% of your taxable distribution will be withheld and sent to the IRS.

Please enter SSN/TIN of **Policy Owner(s)**: _____

Certification – Under penalties of perjury, I certify by signing below that:




- 1) The number shown above is my correct taxpayer identification number;
- 2) I am not subject to backup withholding because:
 - a) I am exempt from backup withholding, or
 - b) I have not been notified by the IRS that I am subject to backup withholding as a result of failure to report all interest or dividends, or
 - c) the IRS has notified me that I am no longer subject to backup withholding, and
- 3) I am a U. S. person (including a U.S. resident alien).

Certification Instructions – You must cross out item **2)** above if you have been notified by the IRS that you are currently subject to backup withholding because you've failed to report all interest and dividends on your tax return.

IMPORTANT TAX INFORMATION

Receipt of any funds from your annuity contract, if from a partial withdrawal or a surrender of the contract, may generate taxable income. In addition, if you are not 59½ years of age or permanently disabled, receipt of funds may be a premature distribution, generating an additional income tax. We suggest you contact your tax advisor before completing this request.

☒ **SIGNATURE BLOCK - I (We) certify, under penalties of perjury, that the information reported herein is correct.**

_____		
Date	Signature of Policy Owner	Signature of Joint Owner
_____		_____
Witness (Not a Relative or Beneficiary)	Signature of Spouse	Signature of Assignee/Irrevocable Beneficiary

Policy Owner's Mail Address • City, State • Zip Code

Policy Owner's Home Phone • Work Phone • Fax Line • E-Mail Address

FOR ADMINISTRATIVE OFFICE USE ONLY

RECORDED BY _____ DATED _____

LIFESECURE INSURANCE COMPANY • AT GREENVILLE, SOUTH CAROLINA