ILLINOIS MUTUAL®
Life Insurance Company

300 S.W. Adams Street Peoria, IL 61634
Phone 309.674.8255

ANNUITY TRANSFER ORDER

I hereby direct my Current Account Custodian, Contract Issuer or Plan Administrator to transfer funds from my current account to my Illinois Mutual annuity as follows:

1. Current Account Custodian, Contract Issuer or Plan Administrator

Name ______________________________

Address ______________________________

City/State/Zip ______________________________

2. Current Account Information

Account or Contract Number ______________________________

Account Owner ______________________________

Investment Name ______________________________

Investment Type ☐ CD/Savings ☐ Annuity Contract ☐ Mutual Fund
☐ Other ______________________________

3. Distribution Instructions

Non-cash assets must be liquidated

a. Amount: ☐ Distribute all monies or ☐ Distribute $___________

b. Timing: ☐ On ____/____/____ (maturity date) or ☐ Immediately (I am aware of any penalties)

c. Payment: ☐ Pay by check (as indicated below) or ☐ Pay by wire (transfer fees are the responsibility of the account owner)

4. Authorization

☐ I authorize the Trustee or Custodian named above to distribute my required minimum distribution to me prior to transferring my IRA assets.

5. Tax Information

This transaction is a:

☐ a. Non-qualified Transfer (i.e. CDs, savings etc).

☐ b. IRA Direct Transfer from my current IRA to my IRA annuity with Illinois Mutual. Do not report this transfer as a distribution to me.

☐ c. IRA Direct Transfer from my current IRA to my ROTH IRA annuity with Illinois Mutual.

☐ d. Qualified Plan/TSA-403(b) Distribution, (excludes after-tax contributions) which is being transferred tax-free as an IRA Direct Rollover. The participant irrevocably designates this amount as an IRA Direct Rollover contribution to an IRA annuity with Illinois Mutual.

☐ e. Beneficiary Transfer which is being transferred tax-free as an IRA Direct Rollover.

______________________________ ______________________________
Original Owner's Name Original Owner's Date of Death

Do not withhold any amount for taxes.

Please provide a complete tax breakdown to Illinois Mutual.

Current tax laws are subject to change. You should consult your own tax advisor if you have any questions about the tax treatment of your annuity contracts. Illinois Mutual can not assume responsibility for the tax effectiveness of this transaction.

______________________________ ______________________________
Signature of Account Owner Date

Instructions to the Sales Representative/Client

1. Do not use this form for an IRC Section 1035 Exchange.
2. Do not use this form to transfer a jointly-owned account.
3. CALL the current account custodian, contract issuer or plan administrator for the correct address and transfer requirements.
4. Complete 1 through 5 only. Illinois Mutual will provide payment instructions.
5. Please provide a copy of the previous 12/31 account statement if the account owner is subject to the minimum distribution rules.
6. Mail the form to the Illinois Mutual Home Office, 300 SW Adams St., Peoria, IL 61634, along with:
   - the new application, if applicable
   - the original policy or lost policy statement, if a qualified annuity is being replaced
   - any additional forms (i.e. disclosure, replacement forms, funding authorization).

Payment Instructions

Make check payable to and send to:

Illinois Mutual

FBO ______________________________
____
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Wire To:
JPMorgan Chase Bank, N.A.
ABA Routing & Transit No. 021000021
To credit account of:
Illinois Mutual Life Insurance Company
Wire Receipt Account No. 744944430

Acceptance by Illinois Mutual Life Insurance Company

Illinois Mutual agrees to accept the transfer of funds from your institution and apply them as indicated above.

____
Authorized Signature

____
Title Date