



**JEFFERSON PILOT  
FINANCIAL**

Jefferson Pilot Financial Insurance Company (JPFIC)  
Jefferson-Pilot Life Insurance Company (JPL)  
Jefferson Pilot LifeAmerica Insurance Company (JPLA)

Please complete form and send to the appropriate service center, (check one):  
 Fixed Annuity Service Center: Dept. 5168, PO Box 26074, Greensboro, NC 27420 1-800-950-2454  
 EIA/VA Service Center: One Granite Place, PO Box 515, Concord, NH 03302-0515 1-800-258-3648 ext.5394

**AUTHORIZATION TO TRANSFER NON-QUALIFIED ASSETS**

To be used for transferring non-qualified funds from a financial institution or mutual fund to JPFIC/JPL/JPLA. **This form is not to be used for 1035 Exchanges of insurance or annuity policies.**

**Check one**

- New Sale, Application attached.
- Additional deposit to existing policy\* number \_\_\_\_\_

**Note: Funds will be placed in your policy according to your existing allocation, unless stated otherwise.**

**Type of Existing Account**

- Mutual Fund
- Certificate of Deposit of Non-Qualified
- Other \_\_\_\_\_

**Account Owner's Information**

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
 Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
 Current Joint Owner(if applicable): \_\_\_\_\_

**Current Trustee/Custodian**

Company: \_\_\_\_\_  
 Address: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_  
 Telephone: ( \_\_\_\_\_ ) \_\_\_\_\_ Account Number: \_\_\_\_\_

**Account Owner Election**

Please **liquidate** the above-named account plan as follows (check one option in a and b):

- a.  Immediately
- Upon maturity \_\_\_\_\_
- b.  Entire amount \$ \_\_\_\_\_
- Specified amount of \$ \_\_\_\_\_
- \_\_\_\_\_ % (less fess/expenses)

To the extent there are early withdrawal penalties, I understand and I am aware of these changes.

**Required Signatures:**

\_\_\_\_\_  
Signature of Account Owner Date \_\_\_\_\_

\_\_\_\_\_  
Signature of Joint Owner Date \_\_\_\_\_

\_\_\_\_\_  
Signature Guarantee (if required): Name of Financial Institution if required for Signature Guarantee \_\_\_\_\_

**Acceptance of Funds**

The company hereby agrees to accept the transferred funds and to apply them to a non-qualified annuity as established by the applicant. Your check should be made payable to  Jefferson Pilot Financial Insurance Company  Jefferson-Pilot Life Insurance Company  Jefferson Pilot LifeAmerica Company (fbo: Owner).

Mail to the appropriate service center as checked above.

By:

*Robert A Reed*  
Secretary

\* Policy may be referred to as "contract" or "certificate" in certain states.