

# Trust Certification

Issuing Company: \_\_\_\_\_

If this Trust Certification is used for an agreement among business associates, partners, stockholders or shareholders as applied to such agreement, the word "trust" is construed to mean "agreement" and, if applicable, the word "trustee" is construed to mean "escrow agent", and "trustor" is the person and the business entity who entered into the "agreement" with the "trustee".

Name of Insured/Annuitant: \_\_\_\_\_ Contract No.: \_\_\_\_\_

Date of Trust: \_\_\_\_\_ Trust Tax ID No.: \_\_\_\_\_

Name of Trustor(s) \_\_\_\_\_

Name of Trustee(s) - "Trustee" under the Trust: \_\_\_\_\_

Name of Trust - "The Trust": \_\_\_\_\_

**Trust is:** *(Must check one.)*       Revocable **or**       Irrevocable

**Trust Beneficiary is:** *(Must check one.)*       Human **or**       Non-Human

The law in the State which has jurisdiction over the trust and/or trust document may require a majority or all of the trustees to join in all transactions. If uncertain, the trustees are urged to consult their attorney before answering "No" to the following statement. The above Trustees must act together in all future transactions. *(Check one.)*       Yes       No *(If No, please explain.)*

1. The undersigned Trustee(s) hereby certifies to the Company that the Trust has been properly executed, is now in full force and effect, and is allowed by its term and by law to purchase and/or own the Contract.
2. The undersigned Trustee(s) agrees:
  - a. that the Company may rely solely upon instructions from the Trustee(s) for the exercise of any and all rights of ownership provided by the Contract and for the payment of any benefits thereunder; and,
  - b. to promptly provide to the Company at its Administrative/Home Office with evidence of the appointment of any successor Trustee(s), notice of the termination of the Trust, and notice of any changes or modifications of the Trust that in any way affect the agreements set forth herein.
3. The Trustee(s) warrants to the Company:
  - a. that the Trustee(s) may, under the terms of the Trust and applicable law, exercise all rights of ownership provided by the Contract, including but not limited to, any rights to surrender or transfer, make loans or withdrawals, control dividends, designate beneficiaries and select payment options, and
  - b. that neither the Company nor its representatives are responsible for inquiring into the terms of the Trust and shall not be charged with knowledge of its terms or provisions.

**The Company is relying on the representations made in this Certification and is not responsible for the validity or effectiveness of the Trust. The Company makes no representations directly or through its agents as to the suitability of this Trust as owner of this policy.**

**Taxpayer Identification Number Certification**

Under penalties of perjury, I certify that (1) the number shown on this form is my correct taxpayer identification number; (2) the IRS has never notified me that I am subject to backup withholding, or has notified me that I am no longer subject to such withholding or I am exempt from such withholding; and (3) I am a U.S. person (including a U.S. resident alien). You must cross out item 2 if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return.

Trustees' **Signatures/Date:** *(All current Trustees MUST sign even if all signatures are not required in all future transactions.)*

Daytime Telephone: \_\_\_\_\_ Date: *(mm/dd/yyyy)* \_\_\_\_\_

**Trustee's address.** If more than one trustee, give trustee's name and address to whom all correspondence should be mailed.: