



Request for Policy/Account/Certificate Transfer or Exchange

Current Trustee/Insurance Company/Financial Institution ("FI")
Policy Owner/Account Owner Name(s)
Street Address of Current Trustee/Ins. Co./FI
Policy/Account Number(s) at Current Trustee/Ins. Co./FI
City, State, Zip of Current Trustee/ Ins. Co./FI
Owner Social Security Number(s) or Tax I.D. Number(s)
Telephone Number of Current Ins. Co./FI
Annuitant/Insured Name(s) (if other than owner)

TRANSFER INSTRUCTIONS:
When should the transfer occur?
Please transfer the policy/account values indicated below:
FULL 1035 EXCHANGES: I, the owner, assign and transfer to Royal Neighbors of America...
Approximate Transfer Amount: \$

NON-QUALIFIED TYPE OF TRANSFER:
QUALIFIED TYPE OF TRANSFER:
From: To:
Type of Qualified Transfer or Rollover:
Retirement Plan to an IRA:

REQUIRED MINIMUM DISTRIBUTION (RMD) INFORMATION FOR QUALIFIED PLANS ONLY:
A) Have you reached age 70 1/2 or older in this calendar year?
B) I certify that my RMD has been made or will be made prior to transfer.

FOR ALL TRANSFERS: As the owner of the policy/account/certificate indicated above, I request the above transfer to Royal Neighbors of America. I represent and warrant that said policy/account/certificate has not been assigned or pledged as collateral...

My Annuity/Life policy is:
ENCLOSED NOT APPLICABLE
LOST/DESTROYED: I/we hereby declare under penalty of perjury that the above numbered contract has been lost or destroyed...

Under penalty of perjury, I certify the following:
1. The number shown on this form is my correct social security number; and
2. That I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a 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).

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 have failed to report all interest and dividends on your tax return.
The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

X
Signature of Policy Owner Date Signature of Agent Date

ACCEPTANCE BY ROYAL NEIGHBORS OF AMERICA (FOR OFFICE USE ONLY)
Royal Neighbors of America acknowledges that an application has been received from the Owner to establish an account for this transaction to the extent shown above.
Make check payable to: Royal Neighbors of America • FBO the owner(s) noted above.
Royal Neighbors of America Certificate No. Authorized Signature/Title Date