

# **Income Annuity Beneficiary Death Claim Request**

Annuity Number:	IRS Tax Status: $\Box$ Qualified (IRA) or $\Box$ Non-Qualified	
Annuity Owner:	_ Annuitant: _ Relationship to deceased: _ Email:	
Beneficiary:		
Beneficiary Phone #:		
Beneficiary Mailing Address:		
Payee Option (choose one):		
Payee will be the same as the above indicated Be	neficiary (continuation of periodic payments):	
Approximately \$ for	payments on a periodic basis *.	
Request for a single lump sum payment (Commu-	tation value): \$	
Method of payment (choose one):		
Check sent by regular mail to the above indicated	beneficiary's mailing address.	
<ul> <li>Direct deposit to a bank account by Electronic Fu Authorization Form).</li> </ul>	nd Transfer (Complete additionally the Direct Deposit Bank	
□ Other:		
For Continuation of Periodic Payments - New Beneficiary (if the above named Death Claim Beneficiary should die):		
Full Name:	Relationship to yourself:	
Beneficiary Phone #:	Email:	
Beneficiary Address:		
Beneficiary Date of Birth:	_ Beneficiary SSN:	
For multiple beneficiaries, use the Additional Beneficiaries Form 1514.		

## **Policy/Contract Status Statement**

Unless the surrendering company's policy/contract is attached, I affirm that the policy has been lost or destroyed and that reasonable effort has been made to locate it. To the best of my knowledge, no one else has any right, title or interest in the policy/contract nor has it been assigned, pledged or encumbered.

\* The final periodic payment may be a lesser amount in order to equal the total guaranteed payments amount.



## Federal/State Withholding Instructions (choose below):

You must indicate if Federal/State income taxes should be withheld from your payment. Even if you elect not to have Federal/State income taxes withheld, you are liable for Federal/State income taxes on the taxable portion of your benefits. You may also be subject to tax penalties under the Estimated Tax Payment rules if your payment of estimated tax and withholding, if any, are not adequate.

### IF NO ELECTION IS MADE A 10% FEDERAL INCOME TAX WILL BE WITHHELD.

- DO NOT want Federal/State income taxes withheld from my payment, or
- □ I DO want Federal/State income taxes withheld from my payment. If you elect to have Federal income tax withheld from your payment it will be a minimum of 10% of your withdrawal, per IRS rules. You may have an additional dollar amount withheld in addition to the 10%.

Additional Federal amount to be withheld \$

Arizona or Utah State amount to be withheld \$\_\_\_\_\_ or \_\_\_\_% (not available in other states)

### **Taxpayer Identification Number, Certification and Acknowledgement:**

Social Security Number:

Date of Birth:

Under penalties of perjury, I certify and acknowledge that:

- 1. The number shown on this form is my correct taxpayer identification number.
- 2. I am not subject to backup withholding because (a) I am exempt form backup withholding, or (b) I have not been notified by the Internal Revenue Service 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.
- 3. Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison. For your protection, Arizona law requires the following statement; Any person who knowingly presents a false or fraudulent claim for payment of a loss is subject to criminal and civil penalties.

Beneficiary Signature:		_ Date Signed:
	SIGNATURE NOTARIZATION	
STATE OF	) ss. This instrument above was acknowle	dged before me
COUNTY OF	) this day of	, 20,
	By (Signer):	
IN WITNESS WHEREOF, I have hereunto set my hand and official seal.		
My Commission will expire		Notary Public

Neither American Savings Life Insurance Company nor any of its representatives may provide tax or legal advice. Individuals should consult their tax advisor or legal counsel for specific advice and information regarding their individual situation.