

# INSURANCE OPERATIONS

411 W CHAPEL HILL STREET  
DURHAM, NC 27701-3616  
1.800.626.1899

**WARNING: IT IS A CRIME TO PROVIDE FALSE OR MISLEADING INFORMATION TO AN INSURER OR ANY OTHER PERSON. PENALTIES INCLUDE IMPRISONMENT AND/OR FINES. IN ADDITION, AN INSURER MAY DENY INSURANCE BENEFITS IF FALSE INFORMATION MATERIALLY RELATED TO A CLAIM IS PROVIDED BY THE APPLICANT.**

Named Insured: \_\_\_\_\_

Policy Number: \_\_\_\_\_

## SECTION #13 MUST BE COMPLETED BY THE POLICYOWNER FOR PROCESSING SEE SECTION #14 FOR NOTARY REQUIREMENTS

**1. NAME CHANGE:**  Insured  Owner **NOTE: If other than marriage/divorce a copy of the court decree is required.**

From:

*Please print*

To:

*Please print*

**2. CHANGE OF BENEFICIARY:** *Please Print*

**Primary:**

Relationship:

Address:

Social Security Number:

**Contingent:**

Relationship:

Address:

Social Security Number:

**NOTE: The spouse's signature is required in community property states (AZ, CA, ID, LA, NV, NM, TX, WI and WA) if the beneficiary change is from your spouse to another party.**

Unless otherwise specified, the proceeds of the policy will be paid in equal shares to the living beneficiaries. If all beneficiaries are deceased, the proceeds will be paid to the estate of the insured.

**3. CHANGE OF OWNERSHIP:** *Please Print*

**Change of owner from the undersigned to:**

Name:

Social Security Number:

Address:

Relationship:

Street

City

State

Zip

**4. POLICY LOAN AGREEMENT:** *I request a loan be made on the above referenced policy number subject to the provisions in the policy contract. I understand I am required to pay back this loan with interest. Any balance due will be deducted from proceeds of the policy.*

Initials

Date

Maximum amount available :< \_\_\_\_\_ > Note: this is an estimated loan value as of the date this form was printed.

\$ \_\_\_\_\_ or the full amount available, if less.

Loan to pay premium(s) up to (indicate premium due date) \_\_\_\_\_

**5. SURRENDER OF POLICY:** Please return original policy with this request. For the surrender value, the undersigned policyowner surrenders the policy and requests a check for the proceeds.

**6. SURRENDER OF DIVIDEND ACCUMULATIONS OR PAID UP ADDITIONS:**

Maximum amount available

Other: \_\_\_\_\_

\$ \_\_\_\_\_ or the full amount available, if less.

7. ELECTION OF NONFORFEITURE OPTION: Change policy to  Reduced Paid Up  Extended Term

8. CHANGE OF DIVIDEND ELECTION:

- Apply as premiums  Paid in cash  
 Purchase additional insurance  Apply to policy loan balance  
 Accumulate at interest

9. CHANGE OF BILLING MODE:

Annual  Semi-Annual  Quarterly  Monthly

10. REQUEST FOR LOST POLICY CERTIFICATE (Confirmation of Coverage): Available if the policy has been lost or destroyed at no charge.

11. REQUEST FOR DUPLICATE POLICY: In most cases duplicate policies issued after 1999 are available however; a \$25.00 service charge applies for all duplicate policies.

12. ADDRESS CHANGE: Please check one:  INSURED  OWNER  PAYOR  BENEFICIARY

From: \_\_\_\_\_  
Street Address City State Zip Code

To: \_\_\_\_\_  
Street Address City State Zip Code

**13. POLICYOWNER AUTHORIZATION:**

I request the change(s) indicated on this form be made to my policy(ies) and for my convenience, the company waive requirement that the change(s) I have requested be endorsed on the policy contract.

\_\_\_\_\_  
Signature of Policyowner Signature of Spouse Date

\_\_\_\_\_  
Policyowner Social Security Number Telephone Number

\_\_\_\_\_  
Street Address City State Zip Code

**14. NOTARY: THIS DOCUMENT MUST BE NOTARIZED FOR ITEM(S) 2: CHANGE OF BENEFICIARY, 3: CHANGE OF OWNERSHIP, 4: POLICY LOAN AGREEMENT, 5: SURRENDER OF POLICY, 6: SURRENDER OF DIVIDENDS, OR ITEM 8: CHANGE OF DIVIDEND ELECTION TO BE PROCESSED.**

\_\_\_\_\_  
Notary Signature Date

\_\_\_\_\_  
Notary Seal Commission Expires

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SEE SECTION #14 FOR NOTARY REQUIREMENTS**

Have a question about how to use this form? Please call our Customer Care Department at 1.800.626.1899 to speak with a representative. Representatives are available to assist you Monday through Friday between the hours of 8:30 AM and 6:00 PM Eastern time.