

First **Catholic** Slovak
Ladies **Association**
Of the United States of America

ANNUITY APPLICATION

Please Print - Use Black Ink Only

A Fraternal Benefit Society
24950 Chagrin Boulevard, Beachwood, OH 44122 1-800-464-4642

Branch #: _____ Location: _____ Certificate #: _____

1. Proposed Annuitant

Name: _____
Address: _____
Maiden Name if Female: _____
Telephone #: (____) _____
Date of Birth: ____/____/____ Sex: ____
Place of Birth: _____
Social Security Number: ____-____-____

Is the Proposed Insured a member of First Catholic Slovak Ladies Association? ____ Yes ____ No (If not, apply for membership)

2. Type of Annuity

a) Flexible Premium Deferred: _____ (Form #) _____ Initial Premium Amount: \$ _____
Benefits to Commence at Age _____
Premium Notice: ____ Annual ____ Semi-Annual ____ Quarterly ____ Monthly ____ None
b) Single Premium Immediate _____ Single Premium Amount: \$ _____
Settlement Option Elected: _____

Will this Annuity be a tax qualified plan? ____ Yes ____ No Is it a Rollover or Transfer? ____ Yes ____ No

If Qualified, show basis: ____ Traditional ____ ROTH ____ SEP ____ SIMPLE ____ OTHER ____ Tax Year _____

Other Remarks/Instructions: _____

3. Beneficiary Designation (If more space is needed use an additional sheet. Date, sign and attach to this application.)

Name	Relationship to Proposed Insured	Date of Birth	Social Security #	Share (%)
Primary: _____				

Name	Relationship to Proposed Insured	Date of Birth	Social Security #	Share (%)
Contingent: _____				

4.. Existing Life Insurance and Annuity Information

a. Other Life Insurance or annuities in force? ____ Yes ____ No
If Yes, total amount of life insurance: \$ _____ Total amount of annuities: \$ _____
b. Will this application change or replace any existing life insurance or annuity? ____ Yes ____ No
c. Will any existing values from another policy or annuity (through loans, surrenders, or otherwise), be used to pay premiums for the policy applied for? ____ Yes ____ No
If Yes to a, b, or c, list the insurer and the policy number: _____