

Non-resident verification form



P.O. Box 10385, Des Moines, IA 50306-0385

This form can be used to assist you in providing the required documentation if an application is signed in a state other than the applicant/owner "Resident state."

Definitions

Resident state – is defined for this purpose as the state where an owner has his or her residence, files taxes, and receives mail on a regular basis. A residence can be a primary residence or vacation home. Note: A "time share" will be considered a temporary residence and therefore does not qualify for a primary residence under this form.

For business entity, "Resident state" is defined as the state where the business entity has its primary place of business or place of incorporation. For trusts, "Resident state" is defined as the state where the trust is located or where the trustee has an office or primary residence.

Application state – is where the contract is solicited, the owner signed the application, and where the contract is delivered. The "application state" must be a state where the agent/representative is licensed and the product is approved.

When an annuity product is not available for sale in the owner's resident state, a resident is only allowed to purchase the product in another state if they provide a valid reason to be in the non-resident state, other than solely to purchase the annuity*.

I _____ (Owner/Joint Owner) am a resident of the state of _____.

My valid reason for being in the application signed state of _____ is (other than to purchase an annuity or insurance)

Length of time I have been working with this agent: _____ yrs.

Acknowledgments

- All communications, sales material and negotiations of the application occurred in the application state.
- The application was signed by the owner and the agent/representative in the application state.
- The owner will take delivery of the contract issued in the application state.

I understand that the solicitation for this contract occurred in the application state and that the laws of the application state will govern all legal rights and obligations under the contract applied for.

Owner's signature	Date (mm/dd/yyyy)
Joint Owner's signature	Date (mm/dd/yyyy)
Agent/Representative signature	Date (mm/dd/yyyy)

***State restrictions:** For Alabama, Massachusetts, Minnesota, New York, Oregon, Utah and Washington - Residents of these states are NOT permitted to go outside of their resident state to purchase an annuity product, regardless of the circumstances of the sale.



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