

Charitable contribution request



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

To be completed for one time only charitable contributions to non-profit organizations.

1. Contract information

Annuity IRA Policy/Contract number – This option is not allowed on non-qualified Contracts.

Owner name	Social Security number
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2. Non-profit and disbursement information

Taking a withdrawal from a Contract that has a Guaranteed Lifetime Withdrawal Benefit (GLWB) or Guaranteed Minimum Withdrawal Benefit (GMWB) feature may adversely affect the benefits associated with these features. Please refer to the GLWB or GMWB section in your Contract for more details. If your Contract is a fixed index annuity, this withdrawal will remove funds from the fixed and index accounts on a pro-rata basis, based on the value in each account on the effective date of the withdrawal.

Non-profit information provided by you must be completed accurately. A check will be mailed directly to the non-profit organization; no exceptions can be allowed.

Items to consider:

- All available penalty-free funds will be withdrawn from your Contract first. Amounts requested over the penalty-free amount may be subject to a surrender charge.
- All charitable contributions will be made for the current tax year only and will be processed using the current processing date.
- You must be the age of 70 1/2 prior to the time of your request.
- A maximum of \$100,000 can be sent to non-profit organization per calendar year.

Name of non-profit organization	Amount (\$500 minimum)
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Mailing address

City, State, ZIP

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3. Acknowledgment

I hereby acknowledge that the information provided herein is to the best of my knowledge true and accurate. I also acknowledge that this form must be fully completed and signed by the Owner, and failure to complete any portion of this form may delay the processing of the request.

Taxpayer certification

Under penalty of perjury, my signature certifies that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me);
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, (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. I am a U.S. citizen or U.S. resident alien; and
4. I am exempt from FATCA reporting.

Contract Owner signature	Date (mm/dd/yyyy)
Spousal signature*	Date (mm/dd/yyyy)

*If this transaction is subject to a community property interest, we strongly recommend that you obtain your spouse's signature on the spousal signature line in the acknowledgment section of the form to document his/her consent to this transaction. States that recognize community property interests in property held by married persons include Alaska, Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, and Wisconsin. You understand and agree that the Company may presume that no community property interest exists if you have not obtained your spouse's signature. Further, you understand and agree that the Company has no duty to inquire further about any such community property interest. As a result, you agree to indemnify and hold the Company harmless from any consequences relating to community property interests and this transaction. Please note the term "spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law.



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