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SERVICE REQUEST FORM

Completing This Form

The Owner(s) should complete and sign this form to request the appropriate change(s). Any changes are subject to the provisions of the Contract and the rights of any Assignee of record with the Company. The owner hereby requests the following selected change(s) be made to the contract

Contract Information

Contract Number _____ Insured / Annuitant Date of Birth _____
Insured/Annuitant Name _____
Owner Name(s) _____ Owner Phone # _____
Owner Address _____

Request to Change the Beneficiary

☐ The owner hereby revokes existing designations and requests the beneficiary be changed to the following

Primary Beneficiary _____

Social Security # _____ Relationship to Insured/Annuitant _____

Contingent Beneficiary _____

Social Security # _____ Relationship to Insured/Annuitant _____

(If additional space is needed, attach a separate sheet with the additional information and mark this box ☐ to indicate an additional sheet is attached. **Be sure the additional sheet is signed and dated by the owner.**)

Request to Change the Owner

☐ The owner should be changed as follows

(NOTE: A change in ownership may result in adverse tax consequences. Consult your tax advisor for guidance)

Existing Owner's Name _____ Social Security # _____

Date of Birth _____ Mailing Address _____

New Owner's Name _____ Social Security # _____

Date of Birth _____ Mailing Address _____

I certify, under penalty of perjury, that the information and Social Security Number(s) provided above are true and correct.

Change of Address

☐ Owner ☐ Insured / Annuitant

Old Address _____

New Address _____

Signatures

The owner(s) must sign this form. For ownership changes, the present owner and the new owner must both sign the form. The effective date of the requested change(s) will be the date the request is received in the Home Office of USAlliance - Life and Security Company.

Current Owner's Signature _____ Date _____

Current Joint Owner's Signature (if applicable) _____ Date _____

New Owner's Signature (for Change of Owner only) _____ Date _____

New Joint Owner's Signature (if applicable) _____ Date _____