

# SYSTEMATIC DISTRIBUTION REQUEST FORM

♦ **GENERAL INFORMATION**

(PLEASE PRINT)

Owner Name: \_\_\_\_\_ Contract Number: \_\_\_\_\_  
Annuitant Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

♦ **PAYMENT INFORMATION**

Payment Frequency:  Monthly  Quarterly  Semi-Annual  Annual  
(Payments will be made monthly unless otherwise stated)

First Payment: \_\_\_\_\_  
Month Day Year

All payments will be processed for the day of month corresponding to the elected start date and frequency.

♦ **DISTRIBUTION AMOUNT**

Current (Modal) Interest Earned.

Specified Amount of \$ \_\_\_\_\_

10% Free Amount (Distributed equally over chosen payment mode)

*Note: Your check will be reduced by any applicable surrender charges and Federal and/or State Income Tax Withholding in accordance with your election on Page 2. Not all annuity contracts allow for a 10% Free Withdrawal. Please refer to your contract for details on the availability of free withdrawals and surrender /withdrawal charges.*

♦ **MAILING ADDRESS**

Mail Check:  To the address on file  Alternate Address  Direct Deposit

Alternate Mailing Addressee: \_\_\_\_\_  
\_\_\_\_\_

Financial Institute Name: \_\_\_\_\_

Financial Institute Address: \_\_\_\_\_

Transit Routing Number: |: \_\_\_\_\_ |: Please contact your financial institution for correct information.

Account Number: \_\_\_\_\_ Type of Account:  Checking  Statement Savings

♦ **TAX DISTRIBUTION TYPE**

Premature  
(Contract Owner under age 59 1/2)

Normal Distribution  
(Contract Owner is at least age 59 1/2)

Disability  
(Defined by IRC Section 72(m)(7))

♦ **WITHHOLDING ELECTION**

**YOU MUST COMPLETE THIS SECTION. WE MAY BE REQUIRED TO WITHHOLD TAXES EVEN IF YOU HAVE ELECTED OTHERWISE.**

**Federal Withholding Election (Choose One):**

State Withholding

- I elect not to have Federal Income Tax withheld.
- I elect Federal withholding from this nonperiodic distribution at the rate of \_\_\_\_\_% (min. 10%) or amount of \$\_\_\_\_\_.

If you reside in CT, mandatory 6.99% will be withheld from the taxable amount unless a completed Form CT-W4P election has been submitted for use in calculating the withholding amount.  
 If you reside in IA, MA, ME, NE, OK, or VT - State Income Tax Withholding is required if Federal Tax is withheld. If you reside in NC, OR - You must make an election or elect out of State Income Tax Withholding.  
 If you reside in CA, IN, MD, MO, MT, NJ, NM, UT, WI - you may voluntarily elect State Income Tax Withholding.

Note: We do not withhold in states unless required. If you elect State withholding but fail to provide a dollar amount or percentage, we will withhold at a rate of 5.0% or as required by your resident state.

**State Withholding Election (Choose one):** Resident State \_\_\_\_\_ State specific forms may be required.

- I elect not to have State Income Tax withheld.
- I elect State withholding from this nonperiodic distribution at the rate of \_\_\_\_\_% or amount of \$\_\_\_\_\_.

♦ **DISCLOSURES AND SIGNATURES**

Note: Any person who knowingly and with intent to defraud any insurer or other person files a statement of claim containing any materially false information, or conceals, for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime and subjects such a person to criminal and civil penalties.

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I certify that I am the proper party to receive payment(s) from this Annuity and that all information provided by me is true and accurate. Vantis Life is required to report all disbursements to the Internal Revenue Service. I have also been advised to consult with a tax professional regarding any possible tax consequences resulting from this transaction. I further certify that no tax advice has been given to me by the Issuer.

All decisions regarding this withdrawal are my own. I expressly assume the responsibility for any adverse consequences which may arise from this withdrawal and I agree that the Issuer shall in no way be held responsible.

If I elected Direct Deposit of my distribution, I authorize Vantis Life to initiate credit entries, and if necessary, adjustments for any credit entries made in error to my account as indicated above. The privilege of receiving deposits under this plan may be revoked by Vantis Life if any deposit can not be made into the specified account. The deposits under this election may be discontinued by Vantis Life of the undersigned upon ten (10) days written notice. I understand that Vantis Life is relying on the information that I have provided on this form, and I further understand that Vantis Life will not be liable for any losses or charges due to incorrect, outdated, or incomplete information that has been provided on this form.

<b>X</b>	<b>X</b>	
Signature of Owner	Signature of Joint Owner (if applicable)	Date

<b>X</b>	*As: <input type="checkbox"/> Power of Attorney ** <input type="checkbox"/> Conservator** <input type="checkbox"/> Assignee <input type="checkbox"/> Irrevocable Beneficiary  **Certified Copy of Appointment and Photo I.D. are required.
Signature of Other Authorized Individual*	

NAME OF AGENCY/BANK	INTERNAL USE ONLY	PRODUCER #	BRANCH #
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>