



### Instructions for Qualified Plan Transfer / Rollover

The Internal Revenue code provides for the tax-free transfer of assets in one Qualified Plan to an Individual Retirement Annuity (IRA). If transferred properly, the owner does not recognize gain for Federal income tax purposes at the time of the transfer.

1. Complete the appropriate application for the desired product. If any errors are made, please draw a single line through the error, provide the correct information, and place your initials above the correction. **PLEASE DO NOT** use any form of correction fluid.
  - A. The owner, annuitant, and beneficiary(ies) must be the same on the old and new Qualified Plan.
  - B. Indicate what type of existing Qualified Plan is being transferred, (i.e. IRA / IRA Rollover, SEP, etc.)
2. Read the authorization to Transfer Funds carefully and complete all sections.
3. Contact your current account company to determine if they will require a signature guarantee to process your request. If so, they can instruct you where to get the guarantee. Generally they are available at banks and brokerage firms. Not providing it may delay the transfer process.
4. Submit the appropriate replacement forms if required by your state for life or annuity transfers.
5. Submit the original contract being exchanged. If the policy has been lost or destroyed, initial the space in the "Attach Original Contract" section on the front of this form.

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### Instructions for Non-Qualified Plan Transfer

Funds can be transferred directly from your non-qualified account at a bank, mutual fund company, etc., into a Century Life Assurance Policy or Annuity. There are no tax advantages or limitations to such a transfer as the form is only provided to attempt to expedite the process.

1. Complete the appropriate application for the desired product. If any errors are made, please draw a single line through the error, provide the correct information, and place your initials above the correction. **PLEASE DO NOT** use any form of correction fluid.
2. Read the Authorization to Transfer Funds Form carefully and complete all sections.
3. Contact your current account company to determine if they will require a signature guarantee to process your request. If so, they can instruct you where to get the guarantee. Generally they are available at banks and brokerage firms. Not providing it may delay the transfer process.
4. Submit a copy of a recent statement showing account information. If transferring from a Certificate of Deposit attach the original CD as many banks will not process the request without the original CD.

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### Instructions for (IRC) Section 1035 Transfer

The Internal Revenue Code - Section 1035 (a) provides for the tax-free exchange of an annuity, life, or endowment contract from one life insurance company to another. If exchanged properly, the owner does not recognize gain for Federal income tax purposes at the time of the transfer.

1. Complete the appropriate application for the desired product. If any errors are made, please draw a single line through the error, provide the correct information, and place your initials above the correction. **PLEASE DO NOT** use any form of correction fluid.
  - A. The owner(s), annuitant(s), insured(s), and beneficiary(ies) must be the same on the old and new Contract.
  - B. Indicate it is a 1035 Exchange on the application.
2. Read the Request for 1035 Exchange part of the form carefully and be sure to obtain all necessary signatures.
3. Submit the appropriate replacement forms if required by your state.
4. Submit the original contract being exchanged. If the policy has been lost or destroyed; initial the space in the "Attach Original Contract" section on the front of this form.

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### AGENT MAILING INSTRUCTIONS

**Please send completed application and all transfer paperwork to the following address:**

By Mail:  
CENTURY LIFE ASSURANCE CO  
Life and Annuity Section  
P.O. Box 9510  
Wichita, Kansas 67277

UPS, FedX, etc.:  
CENTURY LIFE ASSURANCE CO.  
Life and Annuity Section  
1035 S. 183<sup>rd</sup> Street W.  
Goddard, Kansas 67052

NOTE TO AGENT: THE HOME OFFICE DOES REGULAR FOLLOW-UP WITH THE SURRENDERING COMPANY. PLEASE FEEL FREE TO CALL THE SURRENDERING COMPANY AT ANY TIME DURING THE TRANSFER PERIOD.