



WESTERN CATHOLIC UNION

A FRATERNAL BENEFIT SOCIETY
510 Maine Street, Quincy, Illinois 62301
(800) 223-4928 – (217) 223-9721
Fax (217) 223-9726
www.wculife.org



REQUEST FOR CHANGE OF OWNERSHIP - ANNUITIES ONLY

Important Notice

Ownership of annuities may not be transferred to another individual – only to an entity such as a trust or a business.

Certificate #:	Annuitant:
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Current Owner:	Social Security #:
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New Owner Information:

Name of Trust or Business:	
Name of Trustee or Authorized Representative:	
Street Address:	
City, State, Zip:	
Phone #:	Tax Identification #:

Additional Requirements:

Please provide trust documentation that includes the name of the trust, name of trustee(s) and successor trustee(s), and the signature page signed by trustee. For a business, please provide documentation that names the individual(s) authorized to act/sign on behalf of the business.

By signing below: The owner(s) understands that this transaction may be a taxable and reportable event. The owner(s) has consulted with an attorney, financial or tax advisor, or accountant and acknowledges that a tax liability may exist and agrees that Western Catholic Union will not be liable for any taxes as a consequence of this change. The owner(s) agree to hold harmless and indemnify Western Catholic Union for any and all claims or demands which may be made by reason of this ownership change.

Current Owner's Signature

Date

New Owner's Signature

Date

Please return the completed form to our office. You will receive a copy to place with your certificate after we have recorded the change.

FOR WESTERN CATHOLIC UNION USE ONLY:

Western Catholic Union has recorded the change requested and retained the original of the request.

Dated at Quincy, IL: _____ **By:** _____

Kent D. Stegeman – Secretary/Treasurer & CFO