



WCU FINANCIAL

ESTABLISHED IN 1877
FAITH | STRENGTH | SECURITY

Western Catholic Union
A Fraternal Benefit Society
510 Maine St, Quincy, IL 62301
217-223-9721 • Fax: 217-223-9726
www.wculife.org

OWNERSHIP CHANGE - ANNUITY

NOTE: Ownership of annuities cannot be changed to another individual

POLICY INFORMATION

Annuitant: _____ Certificate #: _____

Current Owner: _____ Owner SSN#: _____

Current Joint Owner: _____ Joint Owner SSN#: _____
(if applicable)

NEW OWNER'S INFORMATION

Name of Trust or Business: _____

Name of Trustee or Authorized Representative: _____

Address: _____

Phone: _____ Tax ID #: _____

DOCUMENTATION REQUIREMENTS

If naming a **trust** as owner, we require a certification of trust or a copy of the trust pages that include the name of the trust, name of the trustee(s) and successor trustee(s), the tax id number and the signature page(s).

If naming a **business** or other entity as owner, we require a corporate resolution or other documentation that shows who is authorized to sign or act on behalf of the organization.

SIGNATURES

By signing below: The owner understands that this transaction may be a taxable and reportable event. The owner 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 (WCU) will not be liable for any tax consequences of this change. The owner agrees to hold harmless and indemnify WCU for any and all claims or demands which may be made by reason of this ownership change.

Current Owner's Signature: _____ Date: _____

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

New Owner's Signature: _____ Date: _____

You will be sent an endorsed copy for your records once we have processed the change.

FOR WESTERN CATHOLIC UNION USE ONLY:

Western Catholic Union has recorded the change and it is effective as of the date below.

Signature: _____ Date: _____

WCU Officer