



Attached is the form you requested. In order for your request to be processed in a timely manner, the **sections referenced below must be completed on the accompanying form.**

Section A	<ul style="list-style-type: none"> <li>• Account Number</li> <li>• Insured/Annuitant Name</li> </ul>
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Section B	Indicate what person associated with the account is submitting a name change, and how the name appears both before and after the change.
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Section C	Indicate why the name change is being submitted. If due to a court order, please be sure to <b>include a copy of the court order</b> when returning the completed form.
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Section D	<p>Signature requirements for the <b>account owner</b> are determined based on the following examples:</p> <ul style="list-style-type: none"> <li>• <b>Individual:</b> Print and sign your full name as it appears on the policy/contract.</li> <li>• <b>Multiple Owners:</b> <u>All</u> owners must sign.</li> <li>• <b>Partnership:</b> <u>All</u> partners must sign (unless a form authorizing one partner to sign is on file with us).</li> <li>• <b>Corporation:</b> Titled officer must sign. The officer's title must also be indicated. <i>NOTE: In general, the insured/annuitant should not sign as officer. We ask that an additional titled officer sign if the signing officer is effecting a change for his or her personal benefit.</i></li> <li>• <b>Trust:</b> The current trustee(s) must sign.</li> </ul> <p style="text-align: center;"><b>All forms must be dated in order to process your request.</b></p>
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Contact Information	<table> <tr> <td><b>Delivery</b></td> <td><b>Phone</b></td> <td><b>FAX</b></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>• <i>U. S. Mail:</i> PO Box 8027 Boston MA 02266</li> <li>• <i>Shipping:</i> 30 Dan Road, Suite 8027 Canton MA 02021-2809</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>• (800) 628-1936 (Traditional Life)</li> <li>• (800) 541-0171 (Variable Life or Annuity)</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>• (816) 502-4920 (Traditional Life)</li> <li>• (816) 221-7036 (Variable Life)</li> <li>• (816) 221-9674 (Annuity)</li> </ul> </td> </tr> </table>	<b>Delivery</b>	<b>Phone</b>	<b>FAX</b>	<ul style="list-style-type: none"> <li>• <i>U. S. Mail:</i> PO Box 8027 Boston MA 02266</li> <li>• <i>Shipping:</i> 30 Dan Road, Suite 8027 Canton MA 02021-2809</li> </ul>	<ul style="list-style-type: none"> <li>• (800) 628-1936 (Traditional Life)</li> <li>• (800) 541-0171 (Variable Life or Annuity)</li> </ul>	<ul style="list-style-type: none"> <li>• (816) 502-4920 (Traditional Life)</li> <li>• (816) 221-7036 (Variable Life)</li> <li>• (816) 221-9674 (Annuity)</li> </ul>
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**A. Account Information**

Account Number _____	Name of Insured/Annuitant _____
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**B. Details of Change**

Phoenix is hereby requested to adjust the records of said account so that the name of the individual who is:

- Insured/Annuitant     
  Policy Owner     
  Beneficiary     
  Covered Person

Other (indicate relationship to account): \_\_\_\_\_

therein will appear as: \_\_\_\_\_  
(please print)

instead of as: \_\_\_\_\_  
(please print)

**C. Reason for change**

Check one:

- Marriage on (please provide date of marriage): \_\_\_\_\_  
 Court Order (a copy of the Court Order is **required**)  
 Correction: \_\_\_\_\_  
 Other: \_\_\_\_\_

**D. Certification**

The undersigned hereby certifies that the foregoing names identify one and the same individual, and hereby agrees to fully protect and save Phoenix harmless from any and all claims adverse to such change.

**Signatures**

New: \_\_\_\_\_ Previous: \_\_\_\_\_

**Social Security/Tax ID Number:** \_\_\_\_\_

**Current Address**

Change of Address

Signed at: \_\_\_\_\_ on \_\_\_\_\_ Date

Signature of Policy Owner: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Disinterested Witness: \_\_\_\_\_ Date: \_\_\_\_\_