



**Check-O-Matic Service for Premium Payment  
 - Premium Deposit Fund - Loan Repayment  
 Quick Reference**



Please visit [www.nsre.com/phoenix](http://www.nsre.com/phoenix) to obtain service forms, register to view account information, print a current statement or learn more about Phoenix products and services. It's convenient and easily accessible anytime, day or night.

**If applicable, Check-O-Matic Service for Premium Payment has been suspended on current account. Failure to keep your contract/policy paid current will result in lapse or automatic premium loan according to the provisions of your contract.**

<b>Section A</b>	<ul style="list-style-type: none"> <li>• Policy/Contract Number.</li> <li>• Insured/Annuitant's Name.</li> <li>• Owner's Name (if other than Insured/Annuitant).</li> <li>• Include a voided check.</li> </ul>
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<b>Section B</b>	<p>Check the appropriate box in this section, indicating how you would like your deductions applied. Include the policy/contract number(s) along with the dollar amounts and insured/annuitant names(s).</p> <p><i>If you need more space than is provided by our form, please make sure that additional pages include policy number, date and owner's signature.</i></p>
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<b>Section C</b>	<p>Signature requirements are based on the owner designation of the policy/contract. Examples are:</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.</li> </ul> <p><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></p> <ul style="list-style-type: none"> <li>• <b>Trust:</b> The current trustee(s) must sign.</li> </ul> <p style="text-align: center;"><b>Form must be completed in it's entirety, signed and dated in order to process your request.</b></p>
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<b>Contact Information</b>	<table style="width: 100%;"> <tr> <td style="width: 33%; vertical-align: top;"> <p><b>Regular Mail:</b>            PO Box 8027            Boston, MA 02266-8027</p> <p><b>Overnight Mail:</b>            30 Dan Road, Suite 8027            Canton, MA 02021-2809</p> </td> <td style="width: 33%; vertical-align: top;"> <p><b>Phone:</b>            (800) 628-1936 (Traditional Life)            (800) 541-0171 (Variable Life &amp; Annuity)</p> </td> <td style="width: 33%; vertical-align: top;"> <p><b>FAX:</b>            (816) 502-4920 (Traditional Life)            (816) 221-7036 (Variable Life)            (816) 221-9674 (Variable Annuity)</p> </td> </tr> </table>	<p><b>Regular Mail:</b>            PO Box 8027            Boston, MA 02266-8027</p> <p><b>Overnight Mail:</b>            30 Dan Road, Suite 8027            Canton, MA 02021-2809</p>	<p><b>Phone:</b>            (800) 628-1936 (Traditional Life)            (800) 541-0171 (Variable Life &amp; Annuity)</p>	<p><b>FAX:</b>            (816) 502-4920 (Traditional Life)            (816) 221-7036 (Variable Life)            (816) 221-9674 (Variable Annuity)</p>
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**A. Policy/Contract Information**

Policy/Contract Number	Insured's/Annuitant's Name	Owner's Name (If other than Insured/Annuitant)
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**Authorization Agreement for Preauthorized Payments**

I (we) hereby authorize the Company (Note: As used in this form, the word Company means the company that issued the contract.) to initiate debit entries to my (our) checking account and the depository named below.

**Information for New Account**

A voided check is required to establish this service. We may accept a starter check accompanied by a bank letter or a bank letter in lieu of a check. The letter must be on bank stationery, confirming account/owner information including name, account and routing number. The letter must also include the signature and title of a bank officer.

**ATTACH REQUIRED VOIDED CHECK OR BANK LETTER HERE.**

**B. New Accounts/Bank Changes**

<input type="checkbox"/> PREMIUM PAYMENT	Contract or WIP Number	Amount	Insured's/Annuitant's Name
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
<input type="checkbox"/> PREMIUM DEPOSIT FUND - not available for Variable Products	Contract or Agreement Number	Amount \$25.00 Minimum	Insured's/Annuitant's Name
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
<input type="checkbox"/> LOAN REPAYMENT	Contract Number	Amount	Insured's/Annuitant's Name
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

**C. Signature and Date**

Signed at \_\_\_\_\_ Date \_\_\_\_\_  
City and State

Signature of Depositor \_\_\_\_\_ Depositor's Full Name \_\_\_\_\_  
Please Print

Signature of Owner \_\_\_\_\_ Owner's Full Name \_\_\_\_\_  
Owner Must Always Sign if Other Than Depositor Please Print

**See Page 3 for Conditions Applicable to Check-O-Matic**

## Conditions Applicable to Phoenix Check-O-Matic Service

### Premium Payment Service

1. The Company will not be required to give notices of premiums falling due.
2. This service will not be construed as modifying or affecting any of the provisions of the contract or contracts except:
  - a. **Where applicable**, any dividend applied to reduce premiums will be pro-rated on the basis of one-twelfth (1/12) of the dividend on each premium during the contract year.
  - b. During such time as premiums are being paid by use of this service, premiums shall be payable on a monthly basis at a rate approximately equal to ninety-eight percent (98%) of the regular monthly premium rate **on traditional only**.
  - c. Any contract containing the rider "Provision for payment of premiums by Check-O-Matic" shall be amended by the terms of such rider.
3. The Automatic Premium Loan Provision shall be operative **where applicable**.
4. Upon termination of the Check-O-Matic Service Plan, with respect to a contract, the premium payment frequency will automatically be changed to the most frequent modal premium available for your contract. Please consult your agent for additional information.
5. Please be advised that any account from which the premium is drafted, should maintain a sufficient balance to cover the premium due. If an account is insufficient to cover the premium due, the account holder may lose the privilege of this service.
6. Variable Products cannot offer simultaneous deductions for both premiums and loan repayments.
7. If your contract provides for an increasing premium, by signing this document you are authorizing Phoenix to increase the amount debited according to the provisions in your contract .

### Loan Repayment Service

1. The total amount of each authorized loan repayment charged hereunder shall be applied to reduce loan indebtedness under the contract or contracts listed on the reverse side hereof in ascending order by contract number, unless otherwise designated.

### Premium Deposit Fund Service

1. All deposits made as authorized hereunder shall be subject to and controlled by the conditions and provisions of the Premium Deposit Fund(s) or Agreement to which deposited.

### General

1. No payment or deposit shall be deemed to have been made until the Company receives payment for the charge made.
2. Any service may be revoked by the company immediately without notice if any charge is not paid upon presentation, or if the scheduled monthly bank draft amount is less than the total amount required to prevent lapse.
3. A depositor may also request to discontinue the Check-O-Matic service at any time. Based on the scheduled draft date and the notification date to stop the bank draft, drafting may or may not be stopped for the current month.