



## CHANGE OF BENEFICIARY FORM

**Please read all instructions carefully and complete all applicable sections of this form. Unclear or missing information may delay or prevent processing. Sign and date the form and submit all pages.**

POLICY NUMBER			
OWNER'S NAME			OWNER'S SOCIAL SECURITY NUMBER
JOINT OWNER'S NAME			JOINT OWNER'S SOCIAL SECURITY NUMBER
MAILING ADDRESS			
CITY	STATE	ZIP	<input type="checkbox"/> CHECK THIS BOX TO REQUEST A CHANGE OF ADDRESS
STREET ADDRESS ( <b>REQUIRED</b> IF MAILING ADDRESS IS PO BOX)			TELEPHONE NUMBER
CITY	STATE	ZIP	E-MAIL ADDRESS

For each beneficiary give full name, address, date of birth, Social Security number, relationship to insured, and percentage of death benefit. The sum of percentages for each beneficiary type (primary and contingent) must equal 100%. If percentages are left blank, all beneficiaries will receive equal shares. If you wish to designate more than four primary or contingent beneficiaries, attach a signed and dated sheet listing additional beneficiaries including all details requested in the beneficiary designation section.

## PRIMARY BENEFICIARIES

FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE

## CONTINGENT BENEFICIARIES

FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE
FULL NAME		ADDRESS	
DATE OF BIRTH	SOCIAL SECURITY NUMBER	RELATIONSHIP TO INSURED	PERCENTAGE

## INSTRUCTIONS FOR TRUST BENEFICIARIES

**If a trust is named above as a beneficiary, provide the additional information requested below regarding the trust.**

The Company shall not be responsible for the application or disposition of the proceeds by the trustee(s), and the receipt of the proceeds by the trustee(s) shall be full discharge of the liability of the Company under the Policy. The Company is also not responsible for any change of trustee or change to the status of a trust unless written evidence of the change is received at the Company's Home Office.

If a trust is named as a beneficiary and no qualified trustee makes claim to the proceeds within one year after the Company receives notice of the Insured's death, or if the Company receives evidence satisfactory to it within that year showing that no trustee can qualify to receive payment or that a living trust designated as beneficiary was not in effect at the Insured's death, then the proceeds will be paid as if the trust was not a beneficiary. Payment based on such proof shall be full discharge of liability of the Company under the Policy.

Check one of the following boxes to identify the type of trust. For a living trust, provide the requested information.

Living Trust Described Below

Name of Trustee(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Complete Name of Trust \_\_\_\_\_

Date of Trust Agreement \_\_\_\_\_

Testamentary Trust Created Pursuant to the Insured's Will



# INSTRUCTIONS

## Signature Requirements

All applicable required signatures must be included when submitting this form. Processing will be delayed if signature requirements are not satisfied.

**Spouse Signatures** – If the owner resides in a community property state (currently AZ, CA, ID, LA, NM, NV, TX, WA and WI), the owner’s spouse must also sign this form. Unless the company has received written notice of a community property interest in the policy, the company will rely on its good faith belief that no such interest exists and will assume no responsibility for inquiry.

**Trust** – All trustees must sign if required by the trust agreement. A copy of the trust agreement and a current Trustee Certification and Indemnification form must be on file before a withdrawal can be processed. Check the “Trustee” box below the owner signature line.

**Guardian or Conservator** – The guardian or conservator must sign and check the “Guardian” or “Conservator” box, as applicable, to identify the capacity in which they are signing for the owner.

Provide a copy of the guardianship/conservator papers if not previously submitted.

**Power of Attorney** – The attorney-in-fact must sign and check the “Power of Attorney” box to identify the capacity in which they are signing for the owner. Print the date of the power of attorney in the space provided on the signature page. Provide a copy of the power of attorney (if not previously provided).

**Corporation** – Check the “Officer Title” box below the owner signature line and write the title of the officer signing for a corporate owner in the space next to it. Provide a copy of the corporate resolution evidencing the officer’s signing authority.

**Irrevocable Beneficiary** – If you previously named an irrevocable beneficiary, the irrevocable beneficiary’s signature is required.

**Collateral Assignee** – If the policy has been assigned as collateral, all assignees must sign.

### Christian Fidelity Mailing Address and Contact Information

<b>Regular or Overnight Mail</b>	2721 North Central Avenue, Phoenix, Arizona 85004
<b>Fax</b>	(877) 584-2777
<b>Email</b>	OxfordPHS@oxfordlife.com
<b>Policyholder Services</b>	(866) 641-9999
<b>Website</b>	www.cflc.com