

INSTRUCTIONS

Each beneficiary who wishes to assign their portion of the policy proceeds must complete a Beneficiary's Assignment of Proceeds. A beneficiary assigning proceeds to more than one assignee must complete a Beneficiary's Assignment of Policy Proceeds for each assignee. The Beneficiary's Assignment of Proceeds must be submitted to North American Insurance prior to payment of the claim.

Definitions

Assignee: The individual or entity (such as a funeral home) to whom the beneficiary is assigning some or all of the policy proceeds.

Beneficiary: The individual or entity designated at the time of the insured's death to receive death benefits payable under the policy.

Signature Requirements

All applicable required signatures must be included when submitting this form. Processing will be delayed if signature requirements are not satisfied. The Assignee must provide a completed and signed IRS Form W-9.

Trust – All trustees must sign if required by the trust agreement. A copy of the trust agreement and a current Certification of Trustee Powers form must be on file before a withdrawal can be processed. Check the "Trustee" box below the Beneficiary's signature line.

Guardian or Conservator – The guardian or conservator must sign and identify the capacity in which they are signing for the owner. Provide a copy of the guardianship/conservator documents if not previously submitted.

Power of Attorney – Provide a copy of the power of attorney (if not previously provided), and complete and submit a Certification of Power of Attorney form.

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.

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