



**LIFE OR ANNUITY POLICY OWNERSHIP CHANGE FORM**

Please read all instructions carefully and complete all applicable sections of this form. A photocopy of a signed, government issued ID such as a driver's license; state ID or passport must be submitted with the completed form. If no ID is available, the form must be notarized. Unclear or missing information may delay or prevent processing. Sign and date the form and submit all pages.

**CURRENT OWNER INFORMATION**

|                            |       |                                      |                |
|----------------------------|-------|--------------------------------------|----------------|
| POLICY NUMBER              |       |                                      |                |
| CURRENT OWNER'S NAME       |       | OWNER'S SOCIAL SECURITY NUMBER       |                |
| CURRENT JOINT OWNER'S NAME |       | JOINT OWNER'S SOCIAL SECURITY NUMBER |                |
| MAILING ADDRESS            |       |                                      |                |
| CITY                       | STATE | ZIP                                  | E-MAIL ADDRESS |

**NEW OWNER INFORMATION**

|  |       |  |                  |
|--|-------|--|------------------|
| NEW OWNER'S NAME   |       | SOCIAL SECURITY NUMBER   |                  |
| MAILING ADDRESS  |       |  |                  |
| CITY   | STATE | ZIP  | TELEPHONE NUMBER |
| STREET ADDRESS (REQUIRED IF MAILING ADDRESS IS PO BOX)                           |       |  |                  |
| CITY   | STATE | ZIP  | E-MAIL ADDRESS   |
| ARE YOU A U.S. CITIZEN? <input type="checkbox"/> Yes <input type="checkbox"/> No |       | IF NO, ARE YOU A PERMANENT U.S. RESIDENT? <input type="checkbox"/> Yes <input type="checkbox"/> No |                  |

**NEW JOINT OWNER INFORMATION (NOT AVAILABLE FOR TAX QUALIFIED POLICIES)**

|  |       |  |                  |
|--|-------|--|------------------|
| NEW JOINT OWNER'S NAME   |       | SOCIAL SECURITY NUMBER   |                  |
| MAILING ADDRESS  |       |  |                  |
| CITY   | STATE | ZIP  | TELEPHONE NUMBER |
| STREET ADDRESS (REQUIRED IF MAILING ADDRESS IS PO BOX)                           |       |  |                  |
| CITY   | STATE | ZIP  | E-MAIL ADDRESS   |
| ARE YOU A U.S. CITIZEN? <input type="checkbox"/> Yes <input type="checkbox"/> No |       | IF NO, ARE YOU A PERMANENT U.S. RESIDENT? <input type="checkbox"/> Yes <input type="checkbox"/> No |                  |

**ELECTRONIC FUNDS TRANSFER (EFT) AUTHORIZATION  
(LIFE INSURANCE POLICIES ONLY)**

**Changing ownership will not revoke an EFT authorization unless you complete this section. Complete this section to initiate payments by EFT or to change banking information for payment of life insurance policy premiums. If changing ownership of an annuity policy, skip this section.**

By signing below, I (the bank account owner) authorize Christian Fidelity Life Insurance Company to electronically debit all future premiums (including any past due premiums) from the bank account identified below when such premiums are due. I understand that I may revoke this authorization by written notice to Christian Fidelity or by calling (866) 641-9999. If this authorization is revoked, Christian Fidelity will initiate quarterly paper billings.

**For checking accounts, attach a void check over this section. For savings accounts, provide a deposit slip or a bank account statement.**

|                |                |
|----------------|----------------|
| Your Name      |                |
| Your Address   |                |
| <b>-VOID-</b>  |                |
| Routing Number | Account Number |
| 123456789      | 1234567        |

|  |                |                |
|--|----------------|----------------|
| BANK ACCOUNT OWNER NAME*   |                |                |
| <input type="checkbox"/> SAME AS NEW POLICY OWNER or PRINT NAME:   |                |                |
| BANK ACCOUNT OWNER ADDRESS (IF ACCOUNT OWNER IS NOT THE NEW POLICY OWNER)  |                |                |
| BANK NAME  | ROUTING NUMBER | ACCOUNT NUMBER |
| BANK ACCOUNT TYPE  |                |                |
| <input type="checkbox"/> CHECKING <input type="checkbox"/> SAVINGS   |                |                |
| PAYMENT FREQUENCY (SELECT ONE): <input type="checkbox"/> MONTHLY <input type="checkbox"/> QUARTERLY <input type="checkbox"/> SEMI-ANNUALLY <input type="checkbox"/> ANNUALLY |                |                |

**\*The bank account owner must sign this form on page 3 to authorize the EFT premium payments.**



# 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 Christian Fidelity has been notified of a community property interest in the policy, Christian Fidelity 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 provided. Check the “Trustee” box below the owner 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 papers 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. An updated Certification of Power of Attorney form is required every 12 months.

**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                                      |