

Owner/Annuitant Change Request (non-qualified plans only)



Minnesota Life Insurance Company - a Securian Financial company
 Annuity Services • PO Box 64628, St. Paul, MN 55164-0628
 1-800-362-3141 • Fax 651-665-7942

Contact Information

Contract number		Telephone number <input type="checkbox"/> Cell <input type="checkbox"/> Landline	
Owner's name		Date of birth	Social Security number or TIN
Joint owner's name		Date of birth	Social Security number or TIN
Active address of record	City	State	Zip code
Complete if address of record has changed - this will be a permanent change	City	State	Zip code

Owner/Annuitant Change

I wish to change: Owner Annuitant Both

Name of primary owner/annuitant				Name of joint owner/annuitant			
Social Security number or TIN	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female		Social Security number or TIN	Date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female	
Mailing address				Mailing address			
City	State	Zip code		City	State	Zip code	
Email address				Email address			
Relationship to current owner/annuitant				Relationship to current owner/annuitant			

Ownership Change

According to the Internal Revenue Service (IRS), an ownership change to someone other than a spouse is a reportable tax event to the current owner, for the current tax year, of the unreported interest. If the change is to or from a trust, it is a reportable tax event only if the current Tax Identification Number is changing.

Please select the type of ownership change:

Taxable ownership change - unreported interest will be taxable to the current owner

Or

Non-taxable ownership change

Note:

- If changing to a trust, include a completed Certification of Trustee Authority (F84972).
- This owner/annuitant change will not change the beneficiary designation. If you desire to change the beneficiary, please complete the Beneficiary Change Request form (F58397).
- If there is an Estate Enhancement Benefit (EEB) rider on this contract, the EEB calculation will continue to be based on the age of the original owner as of the contract's issue date.
- If there is a Guaranteed Income Provider Benefit rider on this contract, it will now be based on the age of the new owner/annuitant.
- If there is a Guaranteed Minimum Income Benefit rider on this contract, the rider will terminate upon ownership change.
- If your contract has a Guaranteed Living Withdrawal Benefit - Single rider option, the rider will terminate upon ownership change.
- If your contract has a Guaranteed Living Withdrawal Benefit - Joint rider option, the rider will terminate if the ownership change results in a change to any of the designated lives.



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Securian Financial is the marketing name for Minnesota Life Insurance Company. Insurance products are issued by Minnesota Life Insurance Company.

- If your contract has the rider option of Accelerated Death Benefit rider (with the SecureLink Chronic Illness Access product), Premier Protector, Return of Purchase Payments Death Benefit, or SureTrack Plus 90, the rider will terminate upon ownership change unless the new owner assumes full ownership and is essentially the same person (i.e., change from joint ownership to sole ownership by the surviving spouse when one of them dies, or the removal of the owner due to a divorce or qualified dissolution order).
- If your contract has the single rider option of Achiever Lifetime Income, MyPath Ascend, MyPath Ascend 2.0, MyPath Core Flex, MyPath Edge, MyPath Horizon, MyPath Journey, MyPath Summit, or MyPath Value, the rider will terminate upon ownership change unless the the new owner assumes full ownership and is essentially the same person (i.e., the changing from individual ownership to a trust for the benefit of that individual).
- If your contract has the joint rider option of Achiever Lifetime Income, MyPath Ascend, MyPath Ascend 2.0, MyPath Core Flex, MyPath Edge, MyPath Horizon, MyPath Journey, MyPath Summit, or MyPath Value, the rider will terminate upon ownership change unless the new owner assumes full ownership and is essentially the same person (i.e., change from joint ownership to sole ownership by the surviving spouse when one of them dies, or the removal of the owner due to a divorce or qualified dissolution order).
- If there is an active systematic program on the contract, this owner/annuitant change will not cancel or change the program(s).
- If the owner of the contract is non-natural, such as a trust or other entity, an annuitant cannot be changed or added on MultiOption Advantage, MultiOption Guide B, MultiOption Guide L, Retirement Builder II - B Series, Retirement Builder II - L Series, SecureLink Chronic Illness Access, SecureLink Future, SecureLink Ultra, SecureOption Choice, SecureOption Focus, SecureOption Vision, or SecureLink Elevate contracts.
- Information in this form should not be considered tax advice. You should consult your tax advisor regarding your own tax situation.

Signatures

Old primary owner's signature X	Date signed
Old joint owner's signature (if applicable) X	Date signed
New primary owner's signature X	Date signed
New primary owner's email address	
New joint owner's signature (if applicable) X	Date signed
New joint owner's email address	
Power of attorney/conservator's signature (You must obtain a notarized or signature guarantee on this form.) X	Date signed
Financial professional's signature X	Financial professional code Date signed

Note: If the signature of the power of attorney or conservator is required above, the following section must be completed by a notary public.

STATE OF _____)
)SS
 COUNTY OF _____)

On this _____ day of _____, _____ (month, year), before me, a notary public in and for said county and state, personally appeared _____ to me well known to be the person who executed the foregoing instrument and acknowledged that (s)he executed the same as her/his own free act and deed and for the uses and purposes therein stated.

 Notary public

