



Annuity Change Form

Contract Number	Annuitant	Owner (if other than Annuitant)

A Transfer of Ownership from the current owner of the above-referenced contract to the new owner(s) shown below is permissible pursuant to the terms and conditions of the contract. The undersigned owner(s) warrant(s) that he or she has the right to transfer the ownership of the contract and that no proceedings in bankruptcy or insolvency, voluntary or involuntary, have been instituted by or against him/her and he/she is not under guardianship or any legal disability. This change of ownership may be considered a taxable distribution. Consult your personal tax advisor on all tax matters. Please be advised that changing the ownership will terminate any systematic withdrawal that is currently processing in this contract.

Section 1: New Primary Owner

To update beneficiary information in conjunction with this change, the new owner must complete a beneficiary change request.

New Primary Owner Full Name	Social Security or Tax ID
Address	Phone Number
Date of Birth	Gender
Email Address	Marital Status
Relationship with Annuitant	Relationship with Current Owner

Section 2: New Joint Owner

New Joint Owner Full Name	Social Security or Tax ID
Address	Phone Number
Date of Birth	Gender
Email Address	Marital Status
Relationship with Annuitant	Relationship with New Owner

Section 3: Change of Name¹

Select one or more of the following: ☐ Owner ☐ Joint Owner ☐ Annuitant

Marital Status: ☐ Married ☐ Single

Former Name	New Name

Section 4: Date of Birth Correction²

Select one or more of the following: ☐ Owner ☐ Joint Owner ☐ Annuitant

From	To

Section 5: Change of Annuitant Not applicable for joint annuitant, only single annuitant

New Annuitant Full Name	Social Security or Tax ID
Address	Phone Number
Date of Birth	Gender
Email Address	Marital Status



Wichita National Life Insurance Company
Phone 800.522.1625
Fax 888.453.2290
Email WNL@wnlic.com

SIGNATURES

Under penalty of perjury, each owner certifies that his/her Social Security (or taxpayer identification) number is correct as it appears on this form.

*Signature of Current Owner	Date
*Signature of Current Joint Owner (if applicable)	Date
*Signature of New Owner	Date
*Signature of New Joint Owner (if applicable)	Date

***If trust, custodial, corporate, or partnership owned, you must include a title after the signature (e.g., Trustee, Custodian, etc.). If signing pursuant to the power of attorney, you must indicate this after signature (e.g., POA, Attorney-in-Fact, etc.).**

SPOUSAL CONSENT

If the owner lives in a community property state (residents of AZ, CA, ID, LA, NM, NV, TX, WA or WI) and the owner's spouse is NOT named as the joint owner (if applicable), spousal consent is required to make the change.

☐ No current spouse Check this box if you do not have a spouse or if your spouse is deceased.

*Signature of Current Owner's Spouse	Date

Annuity Change Instructions

General Instructions

Please read these instructions carefully before attempting to change the ownership of your contract. This sheet was created to assist you, but it doesn't cover every situation. Further, nothing stated is intended to constitute legal advice. Please contact your agent if you have any questions.

Please note that ownership changes may result in a taxable event for the current owner. Please consult your tax advisor regarding any applicable reporting requirements.

- Write the name of the new owner and/or the new joint owner in the corresponding section of the form. All information in the appropriate section must be completed to proceed.
- Indicate the relationship between the owner and the annuitant.
- ¹If you are updating a name, proof of the new name must be provided (e.g., marriage certificate, driver's license, etc.)
- ²If you are correcting the date of birth, proof of the date of birth must be provided (e.g., driver's license, birth certificate, passport, etc.)
- Sign and date the form, including appropriate titles (e.g., Trustee, Guardian, etc.) if necessary.
- All current owner(s) must sign on the appropriate lines releasing ownership, and the new owner(s) must sign where indicated accepting ownership.
- Full power of attorney or guardianship paperwork must be submitted for review if signing in that capacity.
- Form must be received by Wichita National Life Insurance Company within 90 days of the signature date.
- Additional requests submitted in conjunction with a change of ownership must be signed by the new owner and dated on or after the ownership change request.

Custodial Ownership

Ownership can be changed to a custodian on qualified contracts **only**. We are unable to process a change of ownership to a custodian on a non-qualified contract. A change from a custodian is not taxable or tax reportable but may impact established systematic withdrawals.

Trust as Owner

When designating trust as the owner of the contract, trust documents must be provided for review. In lieu of full trust documents a trustee certification form may be submitted. However, if successor trustee information must be reviewed in conjunction with the requested change, full trust documents need to be provided.

The full name of the trust, Tax ID number, trustee(s) names, and the trust's status of revocable or irrevocable must be provided. The ownership change form must be signed by all acting trustees with appropriate title.

Please note that ownership changes to a trust may result in a taxable event for the current owner. Please consult your tax advisor regarding any applicable reporting requirements.