



# CLC

## Life Insurance

700 Taylor Road, Suite 280 · Gahanna, OH 43230-3320  
Telephone: 800-845-0494 · Fax: 614-944-4748 · [www.TheCLC.org](http://www.TheCLC.org)

### AUTHORIZATION TO TRANSFER UNDER INTERNAL REVENUE CODE SECTION 1035

To: \_\_\_\_\_  
(Present Company)  
\_\_\_\_\_  
(Address)  
\_\_\_\_\_

Owner: \_\_\_\_\_  
(Name)  
\_\_\_\_\_  
(Address)  
\_\_\_\_\_

Sir/Madam:

You are the insurer for the following:  my insurance policy number \_\_\_\_\_  
 my annuity policy number \_\_\_\_\_

Please be advised that I have applied for a new insurance/annuity certificate with the **Catholic Ladies of Columbia**. You are hereby requested to: (1) surrender \_\_\_\_\_ all of my policy or (2) \_\_\_\_\_ make a partial withdrawal of \$ \_\_\_\_\_ from the above policy and transfer proceeds by check as a tax-free exchange of policies under IRC 1035(a).

It is my intention that this payment shall not constitute actual or constructive receipt to me for income tax purposes. I request that you direct payment in my behalf by check drawn to and forwarded to: **Catholic Ladies of Columbia** at the above address.

I request that my name not appear as a joint payee on the check nor shall my endorsement thereon be necessary for transfer or deposit.

For the purpose of this transfer, Catholic Ladies of Columbia is authorized to endorse, on my behalf, any checks or negotiable instruments received by them for my benefit in purchasing the certificate.

Very truly yours,

X \_\_\_\_\_  
(Individual Signature)

Date: \_\_\_\_\_

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### TO BE COMPLETED BY CATHOLIC LADIES OF COLUMBIA CATHOLIC LADIES OF COLUMBIA AUTHORIZED ACCEPTANCE

Re: \_\_\_\_\_

Sir/Madam:

This is to advise you that Catholic Ladies of Columbia will accept the check as stated above and will transfer it to the certificate number, under Section 1035(a) of the Internal Revenue Code. Please put the Annuitant's name on all documents sent us.

Insurance Certificate Number \_\_\_\_\_

Annuity Certificate Number \_\_\_\_\_

All communication should be directed to the attention of the undersigned.

Very truly yours,

Loni A Perkins, Vice President of Operations  
Catholic Ladies of Columbia