



CLC

Life Insurance

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

AUTHORIZATION TO TRANSFER AN INDIVIDUAL RETIREMENT ACCOUNT

To: _____
(Present Trustee)

Owner: _____
(Name)

(Address)

(Address)

Sir/Madam:

You are the trustee for my IRA; account number _____. Please be advised that I have applied for an IRA Annuity certificate with the **Catholic Ladies of Columbia**. You are hereby requested to: (1) surrender ____ all of my account or (2) ____ make a partial withdrawal of \$_____ from the above IRA account and transfer proceeds by check as a tax-free exchange.

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 purposes of this transfer, Catholic Ladies of Columbia are authorized to endorse, on my behalf, any checks or negotiable instruments received by them for my benefit in purchasing the IRA Annuity.

Very truly yours,

X _____
(Individual Signature)

Date _____

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 an IRA Annuity. Please put the Annuitant's name on all documents sent to us.

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