

Ownership Information Sheet

18-162-2 (03/19)



Americo Financial Life and Annuity Insurance Company
Administrative Office: PO Box 410288, Kansas City, MO 64141-0288

The following is provided to assist in designating a new Owner.

WHO MAY NAME OR CHANGE THE OWNERSHIP ON A POLICY?

Only the owner of an insurance policy may change the ownership. If an irrevocable beneficiary has previously been named, we must have their signature on the change form also.

If the owner of the policy is a trust, signature(s) and title(s) of the trustees are required.

If the owner of the policy is a corporation, partnership, or business, two company officer signatures and titles are required (President, Vice President, Secretary, etc.).

If the owner of the policy is a sole proprietorship, the sole proprietor must sign.

WHO MAY BE NAMED AS OWNER?

The owner may be one person, more than one person, a trust, a corporation, or any other entity from which a legal signature(s) can be obtained. If multiple owners are designated, the signature of every owner must be included on any future policy change requests. If this is a Qualified Plan, ownership changes may be restricted.

WHAT IS THE DIFFERENCE BETWEEN A PRIMARY OWNER AND A CONTINGENT OWNER?

The **Primary** owner is the person(s) or entity(ies) who will maintain control of the policy while the insured is living. The owner of the policy is the only person or entity who can make changes to the policy.

The **Contingent** owner assume(s) control of the policy if the primary owner should pass away prior to the Insured.

HOW DO I NAME A TRUST AS AN OWNER?

Please provide the trust name, date, tax identification number, and address of the trust where indicated on the Ownership Change Request form.

HOW DO I NAME A COMPANY AS AN OWNER?

Please provide the company name and corporate resolution listing who can sign on behalf of the company. Two signatures and titles are required on the Ownership Change Request form.

WHAT IS REQUIRED IF I LIVE IN A COMMUNITY PROPERTY STATE?

If you reside in one of the Community Property States listed below, your spouse's signature is required. If you are divorced, a copy of the divorce decree showing all rights were given up by your spouse is required. If your spouse is deceased, a copy of the death certificate is required. Your request cannot be processed without this documentation.

Community Property States: Arizona, California, Guam, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin.

WHO QUALIFIES AS A WITNESS?

Any adult who is not the insured, current owner, or new owner.

If alterations have been made, the current owner must initial any changes.

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Ownership Change Request

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Administrative Office: PO Box 410288, Kansas City, MO 64141-0288

Phone 800.231.0801 Fax 800.395.9238 Email Documents: forms@americo.com

Policy Number	Current Owner's Name	Insured's Name
Street Address (Include City, State, and ZIP)		
Phone Number	Owner's Email Address	

(Please print in all sections)

New Primary Owner (Select one type) <input type="checkbox"/> Individual <input type="checkbox"/> Company <input type="checkbox"/> Trust		New Primary Owner Name	Birth Date or Trust Date
Relationship to Insured	Phone Number	Email Address	
Street Address (include City, State, and ZIP)			
Social Security Number or Tax ID		Signature (Include Title if Company or Trust) X	
New Contingent Owner (Select one type) <input type="checkbox"/> Individual <input type="checkbox"/> Company <input type="checkbox"/> Trust		New Contingent Owner Name	Birth Date or Trust Date
Relationship to Insured	Phone Number	Email Address	
Street Address (include City, State, and ZIP)			
Social Security Number or Tax ID		Signature (Include Title if Company or Trust) X	

X _____
Signature of Current Policy Owner Date _____

X _____
Signature of Current Joint Policy Owner (if applicable) Date _____

X _____
Signature of Spouse (if applicable*) Date _____

**If you reside in one of the Community Property States listed below, your spouse's signature is required. If you are divorced and reside in one of the community property states, a copy of the divorce decree showing all rights were given up by your spouse is required. If your spouse is deceased, a copy of the death certificate is required. Your request cannot be processed without this documentation.*

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X _____
Signature of Witness Printed Name of Witness _____

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