



**WILLIAM PENN LIFE INSURANCE  
COMPANY OF NEW YORK**

Attention: Retirement Services  
3275 Bennett Creek Avenue  
Frederick, MD 21704  
(855) 914-9123

**Electronic Funds Transfer  
Authorization**

Annuitant Name: \_\_\_\_\_

Certificate Number(s): \_\_\_\_\_

Address: \_\_\_\_\_

Check For All Certificates:

Address: \_\_\_\_\_

Last 4 Digits of Social Security #: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**Bank Account Information - Checking or Savings Accounts Only** (For checking accounts, it is requested that you attach a voided check with the account holder's name pre-printed on it for validation. Starter checks are not permitted.)

Please Print Clearly

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\_\_\_\_\_  
Bank Account Owner's Name

\_\_\_\_\_  
Bank Account Owner's Address

\_\_\_\_\_  
Financial Institution's Name

\_\_\_\_\_  
ABA Routing Number (Typically 9 digits)

\_\_\_\_\_  
Account Number

Account Type:     Checking             Savings

**Authorization**

I understand that all distributions associated with the above certificate number(s) will be processed according to these instructions and agree to the following:

I authorize Legal & General America and its subsidiaries to deposit benefit payments automatically to the account specified above as they become due and payable, by initiating credit entries to my account electronically or by any other commercially accepted method, and I authorize the financial institution named above to credit the same to my account. If funds to which I am not entitled are deposited to my account, I authorize the financial institution to debit the same from my account. This authority will remain in effect until Legal & General America and its subsidiaries have received written notice from me of its cancellation in such time and manner as to afford Legal & General America and its subsidiaries and the financial institution reasonable opportunity to act on it.

Further, I understand service charges may be associated with my account and that I should contact my financial institution to determine these charges, if any. I also understand that Legal & General America and its subsidiaries are not responsible, in any way, for these service charges.

X \_\_\_\_\_  
Annuitant's Signature

\_\_\_\_\_  
Date