



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

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

**Retirement Annuity  
Beneficiary Designation Form**

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

Certificate Number: \_\_\_\_\_

Check to Apply Change to All Certificates:

Any certificate proceeds payable upon the death of the annuitant will be paid to the beneficiaries named herein. If no percentage is provided, proceeds will be divided equally among all surviving beneficiaries. All prior revocable designations of beneficiaries are hereby revoked. If you have multiple certificates for which you do not wish to designate the same beneficiary, please complete a separate form for each certificate.

**1. Beneficiary Designation**

If additional space is needed, please attach a separate page, signed and dated. Social Security Number (SSN) or Tax ID # or Date of Birth are REQUIRED. Please print clearly.

Name \_\_\_\_\_

SSN or Tax ID # \_\_\_\_\_

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Telephone # \_\_\_\_\_

City \_\_\_\_\_

% Share \_\_\_\_\_

State/Province \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Name \_\_\_\_\_

SSN or Tax ID # \_\_\_\_\_

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Telephone # \_\_\_\_\_

City \_\_\_\_\_

% Share \_\_\_\_\_

State/Province \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

Name \_\_\_\_\_

SSN or Tax ID # \_\_\_\_\_

Address \_\_\_\_\_

Date of Birth \_\_\_\_\_

Address \_\_\_\_\_

Telephone # \_\_\_\_\_

City \_\_\_\_\_

% Share \_\_\_\_\_

State/Province \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_

Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

**2. Signature**

No proceedings in bankruptcy or insolvency, voluntary or involuntary, are pending against the undersigned, nor is the undersigned under guardianship or any other legal disability. This designation shall be invalid if the person making it does not have the right to change the beneficiary under the certificate specified. Any payment made by William Penn Life Insurance Company in good faith pursuant to the foregoing designation shall fully discharge William Penn Life Insurance Company of its liability under the certificate.

_____	_____	_____
Print Annuitant's Name	Signature of Annuitant/Title	Date
_____	_____	
Address	Telephone Number	
_____	_____	
Address	Email Address	
_____	_____	
City	Additional Signature (if required - see below) Date	
_____	_____	_____
State/Province	Zip/Postal Code	Country

For **MA** residents, state law requires that a disinterested adult who is not a party to the certificate witness this request.

**AZ, CA, ID, LA, NV, NM, TX, WA, WI, and Puerto Rico** are community property law states. These laws may apply depending on your current marital status, marital status at the time of certificate issuance, state where your certificate was issued, residence state at time of issuance, and residence state(s) since issuance. Consult with your legal or tax advisor to determine whether these laws apply to you and whether a spousal signature is required on this form. William Penn Life Insurance Company disclaims any responsibility for determining the applicability of community property laws or the validity of the requested change.

To insure your request is processed without delay, please make sure the following have been completed:

- Did the Annuitant sign and date the form?
- Did you provide the SSN or Tax ID #, Telephone # and Date of Birth for all beneficiaries?
- Do the percentage totals equal 100%?
- Did you include an additional signature if applicable?
- If you designated more than 5 beneficiaries, did you attach an additional page signed and dated?
- If a trust is listed as a beneficiary, did you enclose the title and signature page of the trust document?

**BENEFICIARY DESIGNATION INFORMATION**

The beneficiary designation form is an IMPORTANT DOCUMENT. Please read the following carefully. If multiple beneficiaries are named and no percentage distribution is noted, then any proceeds payable to such beneficiaries will be split equally amongst all living beneficiaries. Unless otherwise specified, if there is more than one beneficiary, and one predeceases the Annuitant, benefits will be paid to the surviving beneficiaries according to their respective interests. If no beneficiaries survive the Annuitant, benefits will be paid to the Annuitant's estate. Beneficiary designation changes may have legal or tax consequences, please consult your legal or tax advisor to discuss your individual needs. Once received, this beneficiary designation will replace all prior designations.

**Contact Information:**

William Penn Life Insurance Company  
Attention: Retirement Services  
3275 Bennett Creek Avenue  
Frederick, Maryland 21704

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Faxed, emailed or mailed copies will be accepted.