

**United Home Life Insurance Company
Ownership Change**

Insured: _____ Policy Number(s): _____

I (we) hereby transfer all right, title and interest in above policy subject to the conditions and provisions of the policy, to:

NEW Policyowner(s) Name _____

MULTIPLE OWNERS WILL OWN JOINTLY, WITH RIGHTS OF SURVIVORSHIP, UNLESS OTHERWISE STATED

Contingent Owner(s) (If Desired) _____

Contingent Owner(s) Address _____ City _____ State _____ Zip _____

X _____ X _____
Signature of CURRENT Policyowner(s) Signature of CURRENT Policyowner(s)

X _____ X _____
Signature of AGENT OR WITNESS Date

RELEASE OF INTEREST: Required Completion if the policy is assigned or the owner lives in a Community Property State.

a. By: Collateral Assignee Other (Specify) _____ For value received, I hereby release all rights, title, and interest in the above policy.

b. By: Spouse/Former Spouse in a Community Property State (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin)

I (print full name) _____ spouse/former spouse of the current owner of the above policy, hereby release all rights, title and interest which I may have in this policy now or in the future, by virtue of the Community Property Laws of the State of _____.

X _____ X _____
Signature of (Assignee, Spouse/Former Spouse, Other) Designate Relationship

X _____ X _____
Signature of AGENT or WITNESS Date

I, THE NEW OWNER NAMED FOR THIS POLICY, HEREBY CERTIFY UNDER PENALTIES OF PERJURY, THE SOCIAL SECURITY NUMBER PROVIDED IS TRUE, CORRECT AND COMPLETE AND THAT I AM AM NOT SUBJECT TO BACKUP WITHHOLDING UNDER THE PROVISIONS OF 3406 (A) (1) (C) OF THE INTERNAL REVENUE CODE. (This section MUST be completed.)

Foreign Citizenship of Owner/Insured requires an IRS Form W-8 BEN unless holder of Green Card or E-2 Visa.

X _____ X _____
NEW Policyowner's Signature **NEW** Policyowner's Signature

Relationship to the Insured: _____

NEW Policyowner's Address _____ City _____ State _____ Zip _____

NEW Policyowner's Social Security Number _____ and/or Taxpayer Identification No. _____

Effective Date of Ownership Change: Upon receipt at the Home Office, the change will be effective as of the date signed whether or not the insured is living on the day of receipt, subject to any payment or action taken by the Company before receipt of the change of ownership form.

INSTRUCTIONS WHEN THE OWNER IS DECEASED

When the owner of a life insurance policy dies, we must determine if any changes are necessary regarding the ownership of that policy. If there is joint ownership of the policy, and the remaining owners are still alive, or if there is a contingent owner, ownership of the policy is simply passed on to these individuals.

If there is just one owner of a life insurance policy, and that owner dies, the Estate of the deceased becomes the new owner of the contract. In order to transfer ownership from the estate to another entity, we will first need an answer to this question:

Was the value of the Estate more than \$25,000? Yes No

If "**YES**," someone must be appointed by the Court to handle the affairs of the decedent. This person may be designated an **Executor** (Executrix if a woman), an **Administrator** (Administratrix) or **Personal Representative**. There will be legal paperwork, called "**Letters of Administration**," or "**Order Appointing Personal Representative**," naming the person who has the authority to deal with the decedent's property. We **MUST** have a copy of this document.

