

## POLICY OWNERSHIP CHANGE REQUEST

**Important Notice Regarding Change of Owner:** Any proposed new Owner, including Joint Owners, must have met the applicable issue age limits as of the policy issue date.

### Section A: Current Owner Information

Policy Number: \_\_\_\_\_ Annuitant(s): \_\_\_\_\_  
Owner: \_\_\_\_\_ Joint Owner: \_\_\_\_\_  
 Married  Single  Widowed  Married  Single  Widowed  
 Divorced – Specify Date: \_\_\_\_\_ State: \_\_\_\_\_  Divorced – Specify Date: \_\_\_\_\_ State: \_\_\_\_\_

### Section B: New Owner Information

- Change the current Owner – By signing this form, I, the present Owner of the above policy, hereby revoke any previous designation of Owner that is not yet in effect and designate as the Owner of this policy, in accordance with the provisions of the policy, the following:
- Add a Joint Owner – A copy of the new Joint Owner's driver's License must be submitted.
- Full Name: \_\_\_\_\_ Relationship to Annuitant: \_\_\_\_\_  
Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Full Address (City, State, Zip): \_\_\_\_\_  
Email Address (Required): \_\_\_\_\_
- *The new email address you provide will be used for accessing your Canvas customer portal and for all electronic communications.*

### Section C: Consent for Electronic Communications

We are required to provide to you “in writing” certain records and documents in connection with your purchase of a Canvas Annuity issued by Puritan Life Insurance Company of America. With your affirmative consent, we can, instead, provide these documents to you electronically via electronic communication (for example, through the Canvas Customer Portal, e-mail and/or other online messaging).

For contractual purposes, you (a) consent to the use of electronic documents and records in connection with your application for and purchase of a Canvas Annuity issued by Puritan Life Insurance Company of America and all future documents and records associated with administering your Canvas Annuity policy, including, without limitation, this disclosure notice, your application, policy form, annual statements, beneficiary change instructions, or tax forms (collectively, “Electronic Records”), and to receive communications from us or our affiliates in electronic form in connection with annuities, policies and other products, (b) agree that receipt of Electronic Records satisfies any legal requirement that such Electronic Records would satisfy if they were in writing, and (c) that we may accept an electronic signature from you, and that this electronic signature will have the same effect as a physical wet signature and will appear on all records related to the provision of any products and services.

Your consent to receive Electronic Records from us is voluntary. You may (i) obtain a paper copy of any Electronic Record, (ii) withdraw your consent to your receipt of Electronic Records or electronic signatures at any time, or (iii) update your contact information, by emailing Canvas at [contact@canvasannuity.com](mailto:contact@canvasannuity.com). We can also be contacted at our toll-free number of 888-970-3556. Please allow up to 72 hours for processing your requests; you may receive Electronic Records in the interim.

Unless it is otherwise withdrawn, your consent to receive documents electronically is not limited in duration

and does not expire. If you withdraw your consent to use an electronic signature, from that time forward you (i) will be unable to apply for products and services, including insurance products, through the website, and (ii) we will be unable to continue to process any pending applications for products and services, including insurance products.

To access Electronic Records and receive electronic communication notifications, you must register for the Canvas Customer Portal and you must have the following equipment and software: (a) a device that is capable of accessing the Internet; (b) an Internet browser that supports at a minimum HTML 4.0 and 128-bit SSL encryption; and (c) software that permits you to receive and access Portable Document Format or "PDF" files. To retain documents and records, your device must have the ability to download and store PDF files. Your access to this page verifies that your system and device meets the above receipt, access, and retention requirements.

It is your responsibility to notify us of any change in your email address by logging in to the Canvas Customer Portal and navigating to Account Information or using the contact information above. In addition to the consent withdrawal process outlined above, if we receive any indication either that the email notification did not reach you successfully or that there is a problem with your email address or service, we will either resend the record initially provided by electronic transmission by regular mail to you at the address shown on your policy or contact you to confirm or update your email address. We will send you an email to let you know an Electronic Record is available. For some documents, the email itself will be the paperless document. For other documents, the email will contain a link that will allow you to access or download the document, and your login may be required prior to such access. Signing below will indicate your signature and your acceptance of this notice.

#### Section D: Signatures

I have carefully read the request and agree that it is properly and fully completed. I understand that this request is subject to the provisions and conditions of the policy and that the Company may require additional information or requirements. If you are a Trustee, Attorney-in-Fact, Guardian or other fiduciary, indicate the capacity you are acting in and attach relevant legal documentation. By signing below, I understand that all of the current Owner's rights are passing to the new Owner.

**Important: Please include a copy of a legal ID that shows all Owner(s) signatures, current and new.**

**CALIFORNIA FRAUD NOTICE:** For your protection, California law requires the following to appear on this form: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

\_\_\_\_\_  
Owner Signature\*

\_\_\_\_\_  
Printed Name/Title\*\*

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Other Signature\*

\_\_\_\_\_  
Printed Name/Title\*\*

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Owner Address

\_\_\_\_\_  
Owner Social Security No. (Required)

\_\_\_\_\_  
Phone No.

\_\_\_\_\_  
Joint Owner Address (if applicable)

\_\_\_\_\_  
Joint Owner Social Security No.

\_\_\_\_\_  
Phone No.

- \* The signature of all owners is required. Joint Owners sign on 'Other Signature' line and indicate 'Joint Owner' as the title.
- \*\*Power of Attorney (POA) signatures must be signed as 'Principal name by POA name, POA (or AIF)'.
- \*\*If signing on behalf of a corporation, an officer must sign (including title) and include a corporate board of resolution.
- \*\*If signing on behalf of a trust, all current trustees must sign and include title "Trustee".

Completed forms can be emailed or faxed to: Email:

[info@puritanlife.com](mailto:info@puritanlife.com)

Fax: 336-419-0097