

TRUST INFORMATION

INSTRUCTIONS

Use this form to certify the existence of the Trust and the identity and powers of the Trustee(s). All questions must be answered fully. Attach additional sheets as needed.

Puritan Life Insurance Company of America ("Puritan") will continuously rely on information provided in this form. It is the responsibility of the Trustee(s) to notify the Puritan immediately of any changes to the Trust and/or Beneficiaries designated in the Trust.

Section A: Policy Information

Policy Number: _____ (if policy is new, leave blank)

Section B: Trust Information

Formal Name of Trust: _____

Trust Executed Date: _____ Trust Tax ID #: _____

Trust Type (Select one): Revocable Irrevocable

Name of Grantor(s)/Settlor(s) _____

Trustee Information

Name of Trustee(s)	Date of Birth	Address

Co-Trustees (if applicable) (select one): May act independently Must act together

Do the Trustees have power, without limitation, over insurance transactions (including the purchase of a life insurance or annuity contract)? Yes No If no, please explain: _____

Contingent Trustee(s) (if applicable): _____

Section C: Beneficiary Information

Name Beneficiary	Relationship to Proposed Insured/Annuitant

Section D: Signatures

By signing below, the Trustee(s) certifies that:

- The terms of the insurance product(s) being applied for conforms to the income distribution requirements, if any, of the Trust;
- Puritan has the right to request additional information about the Trust if deemed necessary for reviewing or issuing a new or existing policy;
- Puritan may rely on information provided on this form and has no further obligation to investigate the terms of the Trust or the authority of the Trustee(s);
- You have the power under the Trust and applicable law to exercise all ownership rights, privileges options and benefits under the contract(s) listed above, and you understand and agree that Puritan is not obligated to verify that the Trust is in effect or that you are acting within the authority granted to you under the terms of the Trust;
- You agree to indemnify and hold harmless Puritan from any and all liability, including attorney's fees Puritan may incur by acting upon your instructions with respect to any annuity contract, and from all other acts related to such policy(ies) or contract(s);
- The Trustee(s) are aware of the tax requirements for trust ownership of any life insurance policy and/or annuity contract; the Trust will not hold Puritan responsible for any adverse tax consequences as a result of the actions of the Trustee(s).

Trustee Signature

Printed Name

Date

Co-Trustee Signature

Printed Name

Date

Co-Trustee Signature

Printed Name

Date