



# ANNUITY VERIFICATION



Send To: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Applicant/Tenant: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Property Name: \_\_\_\_\_

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

I hereby authorize release of my asset information: \_\_\_\_\_  
(Tenant Signature)

\_\_\_\_\_  
(Date)

Type of Annuity Held:

FIXED   VARIABLE   HYBRID   IMMEDIATE   LIFE   OTHER

Date Annuity was issued: \_\_\_\_\_

Is this the original owner of the Annuity? Yes   No

Current Value \$ \_\_\_\_\_   Cash Value \$ \_\_\_\_\_

Annual earnings or interest rate \$ \_\_\_\_\_   % \_\_\_\_\_

Does the holder have access to the funds? Yes   No

What is the surrender fee or withdrawal penalty to convert this asset to cash? \$ \_\_\_\_\_

Are regular withdrawals/payments being made? Yes   No

Amount: \$ \_\_\_\_\_   Frequency: \_\_\_\_\_

### ***AUTHORIZED SIGNATURE OF PERSON SUPPLYING INFORMATION***

Print Name: \_\_\_\_\_   Title: \_\_\_\_\_

Signature: \_\_\_\_\_   Date: \_\_\_\_\_

Telephone: \_\_\_\_\_

Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements or misrepresentations to any Department or Agency of the United States as to any matter within its jurisdiction.

### ***\*\*OFFICE USE ONLY\*\****

Date Sent: \_\_\_\_\_   By: \_\_\_\_\_

Date Returned: \_\_\_\_\_

Comments: \_\_\_\_\_