



SONS OF  
NORWAY

1455 West Lake Street  
Minneapolis, MN 55408  
(612) 827-3611 or (800) 945-8851  
Fax (612) 827-0658 • [www.sonsofnorway.com](http://www.sonsofnorway.com)

# ANNUITY

APPLICATION

## 1 Annuitant

Please Print

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number (\_\_\_\_) \_\_\_\_\_ Country (if not U.S.A) \_\_\_\_\_

Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_ Sex ☐ Male ☐ Female Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Email Address \_\_\_\_\_

Sons of Norway Member? ☐ Yes Membership No. \_\_\_\_\_ ☐ No (complete member application)

## 2 Joint Annuitant

(only for Non-Qualified Single Premium Immediate Annuity. Must be Spouse of Annuitant)

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number (\_\_\_\_) \_\_\_\_\_ Country (if not U.S.A) \_\_\_\_\_

Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_ Sex ☐ Male ☐ Female Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Email Address \_\_\_\_\_

Sons of Norway Member? ☐ Yes Membership No. \_\_\_\_\_ ☐ No (complete member application)

## 3 Owner

(use only if Annuitant is age 16 or under)

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number (\_\_\_\_) \_\_\_\_\_ Country (if not U.S.A) \_\_\_\_\_

Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_ Sex ☐ Male ☐ Female Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Email Address \_\_\_\_\_

Sons of Norway Member? ☐ Yes Membership No. \_\_\_\_\_ ☐ No (complete member application)

## 4 Beneficiary Information

### Primary Beneficiary:

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_ Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

### Secondary Beneficiary:

First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Last Name \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_ Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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Application continued on back ➡



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Annuity Information

A. Annuity Type: ☐ Deferred ☐ Immediate Settlement Option (Immediate Annuity only) \_\_\_\_\_

B. Premium submitted with application: \$ \_\_\_\_\_

C. Planned Premiums: ☐ Scheduled \$ \_\_\_\_\_ ☐ Unscheduled Mode  

☐ Monthly AWP ☐ Quarterly ☐ Semi-Annual ☐ Annual

D. Tax Status: ☐ Non-Qualified ☐ Tax-Qualified If Tax-Qualified: ☐ IRA ☐ Roth IRA ☐ Other  
If qualified Tax Year Premiums apply \_\_\_\_\_

E. Do you have any existing insurance or annuities in this or any other company? ☐ Yes ☐ No  
If "Yes", complete the replacement forms and give name of company. \_\_\_\_\_

F. Is initial premium a 1035 Exchange, Rollover or Transfer? ☐ Yes ☐ No  
If "Yes", complete applicable forms and give name of company \_\_\_\_\_  
Anticipated Amount \$ \_\_\_\_\_

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Authorization for Automatic Withdrawal

\_\_\_\_\_  
Name of Depositor as it appears on Banking Institution Records

\_\_\_\_\_  
Account or Code Number

\_\_\_\_\_  
Name of Banking Institution

\_\_\_\_\_  
Branch

\_\_\_\_\_  
Address of Banking Institution or Branch where Account is maintained

As a convenience to me, I authorize you to pay and charge to my account checks, share drafts, electronic fund transfer debits or other account debits made upon my account by and payable to the order of Sons of Norway.  
I agree that your treatment of each check, share draft or debit, and your rights with respect to it will be the same as if it were signed or initiated personally by me. I further agree that if any check, share draft, or debit is dishonored for any reason you will not be under any liability even though dishonor results in forfeiture of insurance.  
I further agree that this authorization is to remain in effect until you receive written notice from me of its revocation unless you end it earlier.

\_\_\_\_\_  
Signature of Depositor

\_\_\_\_\_  
Additional Signature (If joint account)

Date \_\_\_\_\_

Staple Voided "Sample" Check to the Authorization

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Signature

I have read the completed application. To the best of my knowledge and belief, the statements above are true and complete. Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

Dated at: \_\_\_\_\_  

CityState

\_\_\_\_\_  
Signature of Annuitant/Owner

\_\_\_\_\_  
Signature of Joint Annuitant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

Agent's Statement: Do you have reason to believe that replacement of any existing insurance other than stated above may be involved? ☐ Yes ☐ No  
If "Yes", please give details: \_\_\_\_\_

\_\_\_\_\_  
Printed Agent Name

\_\_\_\_\_  
St. License No.

\_\_\_\_\_  
Agent Signature

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Date \_\_\_\_\_ 20\_\_\_\_

Received of \_\_\_\_\_ the sum of \$ \_\_\_\_\_ and an application for an annuity to the Sons of Norway. If for any reason the application is declined, this payment is to be refunded. No liability is created or assumed by the Society, except for refund of this payment, until the policy applied for has been issued.

\_\_\_\_\_  
Authorized Signature

If you do not receive your policy within 60 days from this date of your application, please write to:  
Sons of Norway, 1455 West Lake Street, Minneapolis MN 55408

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Make Checks Payable to Sons of Norway