



Banner Life Insurance Company
3275 Bennett Creek Avenue
Frederick, Maryland 21704
(800) 638-8428

OWNERSHIP CHANGE FORM
(Please Print Clearly)

Insured: _____ Policy Number: _____

I. Please complete your request below: SSN or Tax ID # and Date of Birth are REQUIRED.

I elect to change the Policy Owner:

Current Owner Name _____

New Owner Name _____

SSN or Tax ID # _____

New Owner Address _____

Date of Birth _____

City, State _____ Zip _____

Telephone # _____

Relationship to Proposed Insured _____

If Owner is a business, web site address _____

Email address _____

Payor (Will be Owner unless otherwise indicated in this section.)

Send premium notices to: ☐ Insured ☐ Other - If Other, complete the information below

Name _____

Telephone # _____

Address _____

Email address _____

City, State _____ Zip _____

Relationship to Insured/Owner(s) _____

II. Required Signatures

Signature of Current Policy Owner (Required)

Date

Signature of New Policy Owner (Required)

Date

Additional Signature of Current Policy Owner's Spouse** (If necessary)

Date

** AZ, CA, ID, LA, NV, NM, TX, WA, WI, and Puerto Rico are community property law states. These laws may apply depending on your current marital status, marital status at the time of policy issuance, state where your policy was issued, residence state at time of issuance, and residence state(s) since issuance. Consult with your legal or tax advisor to determine whether these laws apply to you and whether a spousal signature is required on this form. Banner Life Insurance Company disclaims any responsibility for determining the applicability of community property laws.

To process your request without delay, please make sure the following have been completed:

- ☐ Did the Current and New Policy Owner(s) sign and date the form?
- ☐ Did you provide the SSN or Tax ID #, Telephone # and Date of Birth for the New Owner?
- ☐ Did you enclose the Trust, if listed as New Owner?
- ☐ Did you include the spousal signature if applicable?
- ☐ Did you include an additional signature if applicable?

How to complete if . . .

Current Owner is a Trust	Please provide complete copy of trust.
Current Owner is a Business	An authorized officer must sign and indicate their title.
Current Owner is Deceased	Please provide a copy of the death certificate along with a Letter of Testamentary or a Letter of Appointment.
New Owner is a Trust	Please provide the full name and trust date, all pages of the trust document and TIN for the trust, names and signatures of all trustees.
New Owner is a Business	Please provide documentation on company letterhead, of who can sign on behalf of the business, listing the officer's full name, signature and title. If the current owner is a business as well, please have the same officer who originally signed the application sign the ownership request. If this person is unavailable, please provide documentation of another authorized person who can sign on behalf of the business and include their full name, signature and title.

Contact Information

Legal & General America
Banner Life Insurance Company
3275 Bennett Creek Avenue
Frederick, Maryland 21704

1-800-638-8428 (telephone)
1-301-294-6960 (fax)
customerservice@bannerlife.com
Faxed, email or mailed copies will be accepted.