

# ANNUITY APPLICATION FOR NEW MEMBER'S SPOUSE

**Knights of Columbus, A Fraternal Benefit Society, 1 Columbus Plaza, New Haven, CT 06510-3326**

### INFORMATION CONCERNING APPLICANT

1. Name of Applicant (last-first-middle initial)

### INFORMATION CONCERNING ANNUITANT

2. Name (last-first-middle initial)

Sex

3. Street

4. City State/Province Zip Code/Postal Code

5. Relationship to Applicant

Age

6. Social Security Number/Social Insurance Number

Date of Birth

7. Amount Paid With Application: (must be at least \$100.00).

\$ \_\_\_\_\_

8. Will this annuity replace, in whole or in part, any existing insurance or annuity now in force? Yes  No

If yes, provide the following information regarding the contract to be replaced.

Company	Year Issued	Amount

### INFORMATION CONCERNING BENEFICIARY

9. Name

Relationship to Annuitant

10. Social Security Number/Social Insurance Number

Date of Birth

### REGARDING MY APPLICATION FOR A KNIGHTS OF COLUMBUS ANNUITY CONTRACT, I UNDERSTAND:

- The long range nature of the annuity being purchased.
- While the Board of Directors will always strive to maintain competitive interest rates, any interest rates not specifically guaranteed at the time of issue of this contract are subject to change from time to time at the discretion of the Board of Directors.
- A surrender charge ranging from 5% to 2% will be imposed on amounts withdrawn from this annuity contract within seven years of deposit, with no surrender charge being made against amounts on deposit over seven years. After the first contract year, if the Accumulation Value is \$5,000 or more, I may withdraw as much as 10% of it once each year with no surrender charge. If a surrender charge is applicable, it will be imposed regardless of my age at the time of withdrawal.
- (a) In the United States: Interest credited to this contract is taxable when proceeds are withdrawn, and a 10% penalty is imposed by the IRS on taxable income withdrawn before the taxpayer is age 59 1/2. (This Internal Revenue Service penalty will not be assessed if the taxable income is disbursed in periodic payments made for the life of the taxpayer.)  
(b) In Canada: Interest credited to this contract is reportable on an annual basis, even if there is no distribution.
- The annuity applied for will be cancelled if the applicant is a candidate for membership and has not been initiated into the First Degree of the Order within 90 days of the date of this application.

Applicant's Signature \_\_\_\_\_

Annuitant's Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_



KNIGHTS OF COLUMBUS

LEVEL ONE SERVICE ORGANIZATION  
A CATHOLIC ENTITY

Fraternal Benefit Society