

ANNUITY VERIFICATION

Send To: «reference_name»
«reference_address_line1»
«reference_address_line2»
«reference_address_line3»
«reference_city», «reference_state» «reference_zip»

Applicant/Tenant: «full_name» Unit #: «apt_nbr»
Soc. Security #: «SSN»
Property Name: «community»
«community_address_line1»
«community_address_line2»
«community_address_line3»
Address: «community_city», «community_state» «community_zip»

Type of Annuity held:
 FIXED VARIABLE HYBRID IMMEDIATE LIFE OTHER

Date Annuity was issued: _____

Is this the original owner of the Annuity? YES NO

Total Amount paid into the Annuity by the individual: \$ _____
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: _____
What is the total amount withdrawn since the contract issue date? \$ _____

AUTHORIZED SIGNATURE

Print Name: _____ Title: _____
Signature: _____ Date: _____
Telephone: _____

RETURN TO: «rental_agent» **RETURN BY:** «return_date»
«mgmt_company»
«mgmt_company_address1»
«mgmt_company_address2»
«mgmt_company_city», «mgmt_company_state»
«mgmt_company_zip»

--OFFICE USE ONLY--

Date Sent: «send_date»
Date Received: _____
Comments: _____

