

**ANNUITY VERIFICATION**

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

Applicant/Tenant: \_\_\_\_\_ Unit #: \_\_\_\_\_

Soc. Security #: \_\_\_\_\_

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

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

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

**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 covert this asset to cash?**    \$ \_\_\_\_\_

**Are regular withdrawals/payments being made?**     **YES**     **NO**

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

***AUTHORIZED SIGNATURE***

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

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

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

***RETURN TO:*** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**--OFFICE USE ONLY--**

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

Date Received: \_\_\_\_\_

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