

New York Life Insurance and Annuity Corporation (NYLIAC) is the issuer of annuity plans for the AARP Lifetime Income Program.

To initiate the transfer of an existing life insurance policy or annuity contract from your current financial institution, please complete sections 1, 2, 3 and 4 in ink, and promptly mail this form back to us in the enclosed postage-paid envelope.

When we receive your completed form, we will review it and immediately forward it on to your current financial institution. If you have any questions, please call one of our Annuity Specialists at 1-800-595-1126. Thank you.

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**1. APPLICANT INFORMATION**

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\_\_\_\_\_  
Applicant (First Name, Last Name)

\_\_\_\_\_  
Joint Applicant (First Name, Last Name)  
(If applicable)

\_\_\_\_\_  
Address Apt. No.

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

( ) \_\_\_\_\_  
Telephone Number

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**2. PROVIDE INFORMATION ABOUT YOUR CURRENT FINANCIAL INSTITUTION**

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\_\_\_\_\_  
Name of Current Financial Institution

\_\_\_\_\_  
Address

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

( ) \_\_\_\_\_  
Telephone Number

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**3. PROVIDE INSTRUCTIONS FOR YOUR CURRENT FINANCIAL INSTITUTION**

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*This is a full liquidation/transfer for the following:*

\_\_\_\_\_  
Policy/Contract Number(s)

\_\_\_\_\_  
Policy/Contract Owner(s)

\_\_\_\_\_  
Account Annuitant(s)

