

## Partial Surrender Instructions

This is available on Universal Life and Variable Universal Life contracts. We will reduce your cash value by the amount requested for a partial surrender. You may be subject to a taxable gain, and a partial surrender charge. In most cases this transaction will also reduce your death benefit. See your contract for specific minimum amount requirements.

### Important Notes:

- **Contact your Financial Representative if you have any questions or concerns.**
- **If this form is incomplete or not legible when returned, your request may be delayed.**
- **Once this transaction has been processed it cannot be reversed.**
- **Send completed forms to: 4321 N. Ballard Road, Appleton WI, 54919 or fax them to 800-225-2264. For your own security, do not e-mail the completed forms to Thrivent, as e-mailed forms will not be accepted.**

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### Page 1 – General Information

- Complete the Name of the Insured.
- Insured's Social Security Number
- Insured's Contract Number
  - **Note:** Only one contract per form.
- Complete the address and phone number of the owner.

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### Page 1 – Type of Distribution

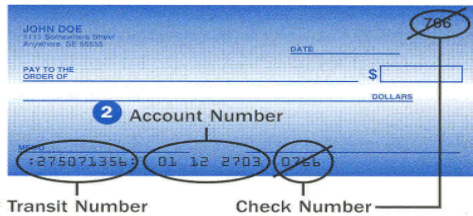
- Check the box titled Partial Withdrawal/Surrender.
- Enter in the amount of distribution requested.
  - **Note:** For Variable Universal Life contracts, a Medallion Signature Guarantee is required for the following transactions:
    - Withdraw a value of more than \$100,000.
    - Sent to address other than address of record.
    - Make the proceeds payable to someone other than the current owner(s).

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### Page 1 – Distribution Option Desired

- Check the method by which you want to receive the distribution; by check, or Direct Deposit to your financial institution.
  - For Direct Deposit, the bank information in the section provided must be completed.
  - The *Account Number* is your bank account number.
  - The *Transit Number* is the 9 digit number at the bottom of your checks found in the lower left corner. This number begins with a 0, 1, 2 or 3. See Sample check below.
  - To ensure accuracy of the account information, please enclose a copy of a voided check.

- 1 Locate the transit number
- 2 Locate the account number



- 1 Transit Number
  - 2 Account Number
- If you want the funds sent applied to another contract check the box titled “*Apply proceeds of \$\_\_\_\_\_*” (found at the bottom of page 1).
    - Enter the contract number(s) funds should be applied to.
    - Enter the amount you want applied as premium, loan or both.
  - If funds are to be sent to a third party or transferred to a third party personal or business bank account, we require a Notary Public Stamp on this form. This can be obtained from most financial institutions.

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### Page 2 – Disclosures of Distribution Request

- Read the disclosures under “Partial Withdrawal/Surrenders” section.

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### Page 3 – Taxable Gain

- Tax Gain amount
  - This value can be received by calling your financial representative or customer service at 800-847-4836, Monday – Friday 7am-9pm CST, or Saturday from 9 am-1pm.
- **Note:** Be sure the Social Security number is completed on page 1. This is required for filing taxation with the IRS.

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### Page 3 – Surrender Decrease Charges

- This value can be received by calling your financial representative or customer service at 800-847-4836, Monday – Friday 7am-9pm CST, or Saturday from 9 am-1pm.

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### Page 3 – Notification for Federal and State Income Tax Withholding

- If there is a taxable event, your request will be subject to Federal and State Income Taxes. By **not checking** any box, Thrivent will automatically withhold 10% federal and possibly state income taxes.
- Complete the Federal Tax Withholding Options. Check one of the following:
  - Do not withhold for federal income tax.
  - Withhold federal income tax.
- Complete the State Tax Withholding Options. Check one of the following:
  - Do not withhold for state income tax.
  - Withhold state income tax.

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### Page 3 – Signatures

- Signature from the owner(s) is required to complete this request.
- Required signatures:
  - **Owner**
  - **Applicant for juvenile contracts**
  - **Absolutely assigned** to a corporation, church, or partnership:
    - Two officers' signatures and their titles
  - **Collaterally assigned** to a bank:
    - One officer's signature and title, and the contract owner's signature
  - **Owned by a trust:**
    - All trustees signatures and titles
    - Certification of Trust, form 24143.
  - **POA, guardian or conservator:**
    - Signature of the POA, guardian, or conservator along with the title of capacity in which they are acting
    - Copy of the legal documents supporting this capacity
  - **Contract has an irrevocable beneficiary:**
    - The owner(s) signature
    - The irrevocable beneficiary's signature (and title if applicable)