

MORGAN KEEGAN A copy of your most recent statement is needed to process this transfer.

Life & Annuity Broker/Dealer and Custodial Ownership Change

50 North Front Street
Memphis, TN 38103
Attn: 6th Floor Annuity Operations

___ **Branch**

___ **Broker Dealer Change**

(Example: Annuity transferred from Edward Jones to Morgan Keegan)

___ **Custodial Ownership Change / Individual to Trustee**

(Example: Change John Doe as owner of his IRA at Edward Jones to Morgan Keegan as custodial owner for John Doe's IRA)

___ **Custodial Ownership Change / Trustee to Trustee**

(Example: Change Edward Jones as custodial owner of John Doe's IRA to Morgan Keegan as custodial owner of John Doe's IRA)

Information about the policy that you are transferring to Morgan Keegan

Client Name(s) (please print) _____ Insurance Carrier _____ Contract Number _____

Client(s) Social Security Number _____ Previous Broker Dealer _____ Contract Owner _____

Broker Dealer Change New Broker Dealer- **Morgan Keegan & Company, Inc.** Tax ID# **64-0474907**

New Agent Name: _____ New Agent SS # _____

New Agent Name: _____ New Agent SS # _____

New Broker Dealer Branch Address _____ Morgan Keegan Account # _____
(Networked/Linked to this a/c-annuities only)

Street _____ Apt./Suite _____ City _____ State _____ Zip _____

Custodial Ownership Change - **Annuities Only**

Morgan Keegan & Company, Inc. C/F _____, IRA Tax ID# 64-0474907
(client(s) name)

Annuitant _____ Date of Birth _____

Beneficiary: Morgan Keegan & Co., Inc. C/F _____ at 100%
(client(s) name)

Mail all future distributions only to the following address-do not mail statements
50 North Front Street, 4th Floor Network / Link to Morgan Keegan Account # _____
Memphis, TN 38103 *(all custodial changes must be assigned a Morgan Keegan Account Number starting with 7 for Tax Reporting)*

Signatures:

I certify that I am licensed and appointed as required by the insurance carrier.

Client/Annuitant Signature _____ Date _____ Joint Owner/Annuitant Signature (if applicable) _____ Date _____

Financial Advisor/ Print Name _____ Branch Manager/Print Name _____

Financial Advisor Signature _____ Branch Manager Signature _____

Morgan Keegan Accepting Custodian Signature _____ Date _____ Releasing Broker Dealer/Custodian Owner Signature _____ Date _____
(please list title)

Medallion Signature Guarantee Stamp

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