



# John Hancock USA Annuities Personal Information Change Form

## INSTRUCTIONS

To make personal information changes on a Venture Variable Annuity Contract

### 1. INFORMATION ABOUT YOU

Current Owner: \_\_\_\_\_ Contract #: \_\_\_\_\_

Current Co-Owner: \_\_\_\_\_ Current Annuitant: \_\_\_\_\_

### 2. ADDRESS CHANGE FOR

Annuitant                       Owner                       New Owner

Street: \_\_\_\_\_

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

**Please note** that if a withdrawal is requested within 30 days of an address change, the withdrawal request must be Signature Guaranteed. Please see our Withdrawal form for more information and options.

### 3. NAME CHANGE FOR

Annuitant                       Owner                       Beneficiary

Reason for change:

Marriage\*                       Divorce\*\*                       Legal\*\*

Change to: \_\_\_\_\_

PLEASE PRINT CLEARLY

\* Certified copy of marriage certificate required

\*\* Certified copy of legal document required

### 4. CHANGE OF

Annuitant                       Owner\*\*\*                       Co-Owner\*\*\*

Name: \_\_\_\_\_ Date of Birth: \_\_\_ / \_\_\_ / \_\_\_ Social security number/TIN: \_\_\_\_\_

**NOTICE:** If any annuitant is changed on a contract with a non-natural owner, the entire interest in the contract, minus any applicable withdrawal charges, must be paid to the owner within five years. Please refer to your contract and prospectus for further details.

### 5. ADDITION OF

Co-Annuitant                       Co-Owner\*\*\*\*

Name: \_\_\_\_\_ Date of Birth: \_\_\_ / \_\_\_ / \_\_\_ Social security number/TIN: \_\_\_\_\_

### 6. CHANGE OF PRIMARY BENEFICIARY

Name: \_\_\_\_\_ Social security number/TIN: \_\_\_\_\_ Relationship to Annuitant: \_\_\_\_\_

To add more than one beneficiary, please attach a signed letter of instruction. If there are co-owner's, the surviving owner is the primary beneficiary.

Personal Information Change Form continued

**7. CHANGE OF CONTINGENT BENEFICIARY**

Name: \_\_\_\_\_ Social security number/TIN: \_\_\_\_\_ Relationship to Annuitant: \_\_\_\_\_

**8. AGENT CHANGE**

New Agent: \_\_\_\_\_ New Broker Dealer: \_\_\_\_\_

Branch Manager signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**9. AUTHORIZATION**

Current Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Current Co-Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

\*\*\*If changing an Owner, new Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Relationship of new Owner to old Owner: \_\_\_\_\_

\*\*\*\*If adding or changing a Co-Owner, new Co-Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Non-spousal Owner changes may have tax consequences, please contact your financial consultant for further clarification.

**10. CONTACT INFORMATION**



**Mail this form to:**  
John Hancock USA  
P.O. Box 55230  
Boston, MA 02205-5230

**Overnight address:**  
John Hancock USA  
601 Congress St.  
Boston, MA 02210-2805



**For assistance call:**  
1-800-344-1029



**www.johnhancockannuities.com**