



**CUSTOMER SERVICE REQUEST  
VOLUNTARY WORKPLACE BENEFITS DIVISION**

Provident Life and Accident Insurance Company  
(Herein called Provident)  
1 Fountain Square, Chattanooga, TN 37402

**For toll free assistance call: 1-800-635-5597**

The policyowner requests a change be made on one of the following policies:

Employee  Spouse  Child  All  Other (explain) \_\_\_\_\_.

Confirm Policy # or Social Security # \_\_\_\_\_

Please confirm the name of your employer (Group Number if known) \_\_\_\_\_.

1.  **Owner's Current Mailing Address** Please confirm your current address  
 **If New Address, Check Here**

\_\_\_\_\_  
 (Number/Street) (Street Address) (Apt. No.)

\_\_\_\_\_  
 (City) (State) (Zip)

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

Check this box if this is the only change you wish to make

2.  **Name Change of**  Insured  Owner

From \_\_\_\_\_ To \_\_\_\_\_

Reason for change:  Marriage  Court Order\*  Adoption\*  Correction\*  Divorce\*  
 Other\* \_\_\_\_\_

\*If name change is due to reason other than marriage or divorce, we will need a copy of the legal document for our records.

3.  **Ownership Change** Change the Owner to:

Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Address \_\_\_\_\_

From the effective date hereof, the Owner designated above alone may exercise every privilege and enjoy every benefit granted under this policy to the Owner except that, if there is an irrevocably designated beneficiary, the Owner may exercise his/her rights only with the consent of such beneficiary. The rights of any deceased beneficiary shall vest in the Owner.

**If Ownership Change is a result of the policyowner's death, we will need a copy of the Will or Letters Testamentary naming you as executor of the deceased's estate. If there is no Will or Letters Testamentary, you will need to contact our office at 1-800-635-5597.**

**Please note that completion of this section had no effect on the beneficiary designation. If a change of beneficiary is desired, complete section 8.**

Request for Taxpayer (Owner's) Identification Number (in lieu Federal Form W-9)

Owner's Soc. Sec. No. \_\_\_\_\_ or Employer's I.D. Number \_\_\_\_\_

**Certification** – Under the penalties of perjury, I certify that this is my correct Taxpayer Identification Number, and I am not subject to backup withholding. If you are subject to backup withholding, then place a check in the box.

Signature of New Owner \_\_\_\_\_ Date \_\_\_\_\_

4.  **Policy Loan Agreement**  MAXIMUM AMOUNT AVAILABLE, OR  \$ \_\_\_\_\_ CASH, OR FULL  
 AMOUNT AVAILABLE, IF LESS. In consideration of the advance by Provident of \$ \_\_\_\_\_ as a loan,  
 all right, title, and interest in the Policy, is hereby assigned to Provident as sole security for the repayment of the loan  
 with interest, subject to the provisions of the Policy which are incorporated and made a part hereof.  
 Check box to confirm that no bankruptcy proceedings are now pending.

5.  **Surrender/Cancellation of Policy** You may surrender your policy for the cash surrender value, if any, otherwise  
 your policy will be cancelled. By electing this option, you surrender the policy  
 and all claims thereunder. If your policy has cash value, a check will be forwarded for the proceeds after deduction of  
 indebtedness and/or applicable surrender charges, if any.  
 Check box to confirm that no bankruptcy proceedings are now pending.

6.  **Request for Duplicate Policy or Summary** This policy was lost or destroyed. \$25.00 Charge for duplicate policies.

**ELECTION OF FEDERAL INCOME TAX WITHHOLDING**

Provident is required to withhold 10% of the taxable portion of the surrender unless you direct otherwise.

Even if you elect to not have Federal income tax withheld, you are liable for payment of Federal income tax on the taxable portion of your distribution. You also may be subject to tax penalties under the estimated tax portion of your distribution. You also may be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate.

I agree  "NO". I do not want Provident to withhold Federal income tax.

7.  **Contingent Owner** Individual who will become policy owner if the primary owner is deceased.

Name	No./Street	City	State	Zip
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8.  **Beneficiary Change(s)** Full given name, address, relationship and percentage must be given to be processed. If you are naming a minor child, you **MUST** include their date of birth. When naming a trust, you **MUST** include the name and date of trust. Unless otherwise specified, proceeds are to be paid in equal shares to the surviving beneficiaries, if more than one.

					Percent	Relationship To Insured
<b>Primary</b>						
Name	No./Street	City	State	Zip	%	
Name	No./Street	City	State	Zip	%	
<b>Contingent</b>						
Name	No./Street	City	State	Zip	%	
Name	No./Street	City	State	Zip	%	

9.  **Coverage Changes**

FROM (OLD POLICY)	TO (NEW POLICY)
Plan _____	Plan _____
Premium \$ _____	Premium \$ _____
Amount \$ _____	Amount \$ _____
Benefits _____	Benefits _____
Riders _____	Riders _____
Non Forfeiture Option: <input type="checkbox"/> APL <input type="checkbox"/> Reduced Paid Up	Non Forfeiture Option: _____ Effective Date _____ <input type="checkbox"/> APL <input type="checkbox"/> Reduced Paid Up

10.  **Policy Assignment Release** The undersigned (No. 12) assignee releases all rights, title, and interest in this policy

11.  **Additional Changes**

12.  **Signatures** Provident is hereby authorized to amend this request to correct obvious errors or omissions. If you live in a community property state, your spouse or ex-spouse **MUST** also sign this form. An adult other than a relative or beneficiary **MUST** witness your signature.

Owner Signature	Owner Soc. Sec. No.	Witness Signature	Date
Spouse Signature	Spouse Soc. Sec. No.	Witness Signature	Date
Assignee Signature	Assignee Soc. Sec. No.	Witness Signature	Date

( )

**Please include your fax # or email if you would like to receive an INSTANT CONFIRMATION of the changes made to your policy:** \_\_\_\_\_

**Acknowledged**

**THIS SECTION FOR PROVIDENT HOME OFFICE USE ONLY**

BY \_\_\_\_\_

DATE \_\_\_\_\_