

Annuity or Stock Verification

Purpose: To verify an applicant's or resident's annuity or stock benefits.

Note: This form must be mailed or faxed to the applicable plan administrator's office. The resident cannot "hand carry" the form.

Special Mention:

- ▶ As a courtesy, include a self-addressed envelop.

Specific Instructions:

1. Enter name of property and unit number.
2. Enter address of plan administrator's office.
3. Enter your property's name and address (contact name and phone number is also helpful).
4. Enter name of the applicant or resident.
5. Enter account number.
6. Enter applicant's Social Security number.*
7. Have the applicant/resident sign and date.

* **Note:** For privacy reasons, a resident may elect not to provide his/her Social Security number on this form. Residents who do not provide their Social Security number should sign Certification #2 on the *Identification Certification* form.

