



## Banking Verification

### Policy Information

Owner(s) Name: \_\_\_\_\_

Policy #: \_\_\_\_\_

### Account Verification

All electronic transaction requests must be accompanied by a Banking Verification form. Attach a voided check or withdrawal slip and confirm account type, i.e. Checking or Savings.

1. **For Checking Accounts:** Please Write "Void" on a blank check (Deposit slip not acceptable), which shows the routing number and account number
2. **For Savings Accounts:** Please Write "Void" on a blank savings withdrawal slip, which shows the routing number and account number

Bank Name: \_\_\_\_\_

Account Type: ☐ Checking ☐ Savings

Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

PLACE VOIDED CHECK  
OR  
SAVINGS WITHDRAWAL SLIP HERE

### Signatures

\_\_\_\_\_  
Owner Name

\_\_\_\_\_  
Owner Signature

\_\_\_\_\_  
Date

Spouse signature is required for all changes to all IRA/qualified plans.

If you do not have a spouse, please confirm by checking the box: ☐ I confirm I do not have a spouse

\_\_\_\_\_  
Joint Owner/Spouse Name

\_\_\_\_\_  
Joint Owner/Spouse Signature

\_\_\_\_\_  
Date