

NAME CHANGE REQUEST

Insured _____ Policy Number _____

Owner (If other than Insured) _____ Date _____

Mailing Address _____

City _____ State _____ Zip Code _____

() _____ () _____

Home Phone Number _____ Work Phone Number _____

Please change the name of the Insured to: _____
Print Name

Owner to: _____
Print Name

Reason for Name Change:

Marriage - Please enclose the following:

- A photocopy of the marriage certificate is required, **OR**
- A photocopy of both Driver's License and Social Security Card, **OR**
- A photocopy of both Driver's License and Passport

Court Order - Please enclose a certified copy of court order (photocopied and fax copies are acceptable)

If owner is an individual or partnership, please sign in the following section:

Previous Signature of owner(s) - *before name change* _____
Print name - *before name change*

Current Signature of owner(s) - *after name change* _____
Print name - *after name change*

If owner is a corporation, please sign in the following section:

Signature of Corporate Officer Title / _____
Signature of Corporate Officer Title

***Notary:** On this day personally appeared before me _____
who executed this form and acknowledged that he or she (or they) signed the same as his or her (or
their) free and voluntary act and deed for the uses and purposes therein mentioned. [Notary Stamp Here]

Given under my hand and official seal this _____ day of _____ . _____
Notary Signature

**Please submit the completed form with required documents to Symetra Life Insurance Company
by fax: 1-866-532-1361, or mail: PO Box 7902 London, KY 40742-7902**

Name Change Instructions

Who can request a name change?

A Policyowner may request a name change for the insured or for themselves at any time. A name change may be requested via a Name Change form or by a letter, as long as it contains all of the information required.

How do you request a name change?

Complete the form with all required signatures and supporting documentation. If certified documents are included, please mail the request to the address below. Original certified documents will be returned to you once processing is complete.

**Symetra Financial
PO Box 7902
London, KY 40742-7902**

If certified documents are not included, you may **fax** the request to **1-866-532-1361**. Please call 1-800-796-3872 if you have any questions.

What is required for a name change?

If the Name Change is due to Marriage:

- Please submit a photocopy of the certified or recorded Marriage Certificate OR,
- A photocopy of both Driver's License and Social Security Card OR,
- A photocopy of both Driver's License and Passport.

If the Name Change is due to Divorce or Legal Name Change:

- If the name change is due to Divorce, Adoption, Religion or a Legal Name change, a copy of the certified copy of the legal document is required. ***Photocopies and faxed copies are acceptable.*** If the original document is submitted, it will be returned to you once processing is complete.

If the Name Change is due to inaccurate completion of the Application:

- Please submit a copy of the birth certificate.

Does the signature need to be notarized?

If the owner's signature does not match what we have on file, a notarized signature will be required. Corporate signatures (with title) also require notary.

Who needs to sign the form?

If the name change is for the Insured: The insured's signature if not required if the policy is owned by an individual other than the insured. Please have the Policyowner sign the form.

If the name change is for the Policyowner: Please include the Policyowner's former signature and the notarized new signature.

If the policy is owned by a corporation: Please include *either*

- A corporate resolution that lists all of the officers who are able to sign on behalf of the corporation and a notarized signature of one corporate officer (other than the insured) with the title and notary.w

OR

- If a corporate resolution is not available, we must have two corporate officer's notarized signatures along with their titles.

If the policy is owned by a trust: The signature of the trustee, along with proof of trustee's assignment is required. A copy of the trust documents will need to be submitted if it is not already on file.

If the policy is jointly owned: The signature of **BOTH** owners is required.