

**For use with claims on policies issued by:**

Aetna Life Insurance Company  
Cigna Life Insurance Company  
Connecticut General Life Insurance Company  
First Penn-Pacific Life Insurance Company  
The Lincoln National Life Insurance Company and Lincoln Life & Annuity Company of New York (collectively Lincoln)  
Voya Retirement Insurance and Annuity Company

**1. Enter Contract or Policy\* Information**

Contract or Policy Number(s):	
Owner Name (First, Middle, Last):	Owner Social Security Number/TIN:
Annuitant/Insured (First, Middle, Last):	Annuitant/Insured Social Security Number:

**2. Enter Trust Information**

Trust Name as it appears on the Trust:	Taxpayer Identification Number (TIN):	State Governing Law of Trust:	
Original Trust Date: (mm/dd/yyyy):	Latest Amendment Date (if any) (mm/dd/yyyy):		
Trust Address (for correspondence):	City:	State:	Zip Code:
Trust Type (select one): <input type="checkbox"/> Irrevocable <input type="checkbox"/> Revocable <input type="checkbox"/> Charitable Remainder Trust (CRT) <input type="checkbox"/> Testamentary <input type="checkbox"/> Nominee		Is this a grantor trust**? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Grantor Name (First, Middle, Last):			
Social Security Number:		Date of Birth (mm/dd/yyyy):	
Grantor Name (First, Middle, Last):			
Social Security Number:		Date of Birth (mm/dd/yyyy):	

- If this Trust has a Tax ID Number (TIN), any taxable distributions from an annuity to the Trust will be reported to the Trust and the Internal Revenue Service. If this Trust does not have a TIN, such annuity distributions will be reported to the Grantor and the Internal Revenue Service.
- The Trust will be treated as a natural person under IRC Section 72 (u) and the Grantor will be treated as the holder of the contract under IRC Section 72(s).
- If the Trust should cease to be a Grantor Trust, the Trustee and/or Grantor will immediately give written notification, including new TIN, to the Lincoln Financial Group.

\* Contract or Policy may be referred to as "Certificate."

\*\* A grantor trust is one in which the grantor has reserved to him/her/itself certain powers that, under current tax law, may generate a tax liability on the grantor. Generally, these would be powers that could lead to a conclusion that the assets of the Trust are treated as owned by the grantor and not the Trust (See, IRC Sections 671-679.) If not sure, please contact your tax/legal advisor to determine whether your trust is a grantor trust.

### 3. Enter Trustee Information

Trustee Name (First, Middle, Last):		Social Security Number:	
Trustee Address:	City:	State:	Zip Code:
Additional Trustee Name (First, Middle, Last):		Social Security Number:	
Trustee Address:	City:	State:	Zip Code:
Additional Trustee Name (First, Middle, Last):		Social Security Number:	
Trustee Address:	City:	State:	Zip Code:
Transaction requests must be authorized by (select one): <input type="checkbox"/> All Trustees <input type="checkbox"/> Majority of Trustees <input type="checkbox"/> Any One Trustee <input type="checkbox"/> Only Specified Named Trustee(s) (provide name): _____			

### 4. Certification and Signatures

- The Trustee(s) is (are) referred to as “you” in this form. By signing below, the undersigned Trustee(s) acknowledge and certify the following:
- You are the named Trustee(s) under the Trust and the information provided on this form is true and accurate;
- You have the power under the Trust and applicable law to exercise all ownership rights, privileges, options, and benefits under the contract(s) and/or policy(ies) listed above, and you understand and agree that the Company is not obligated to verify that the Trust is in effect or that you are acting within the authority granted to you under the terms of the Trust;
- You agree to indemnify and hold harmless Lincoln and the issuing company from any and all liability, including attorney’s fees they may incur by acting upon instructions reasonably believed by them to be valid instructions originating from you with respect to any life insurance policy or annuity contract, and from all other acts related to such policy(ies) or contract(s);
- The Trust is currently in effect and has not been revoked, modified or amended in any manner that would cause the representations in this certification to be incorrect;
- This certification is being signed by all currently acting trustees of the Trust; and
- You agree to inform Lincoln in writing of any change in the Trustee(s), or any event that could alter this certification. (Provide supporting written documentation such as a letter stating that the named Trustee is no longer a Trustee, or a copy of the Trustee’s certified death certificate).
- You understand that, to the extent Lincoln is in receipt of part or all of the trust instrument, Lincoln’s representatives will not undertake to read the instrument, and will rely solely on the representations made above with respect to the trust. In addition, knowledge of the terms of the trust instrument may not be inferred solely from the fact that the trust instrument is being held by Lincoln.
- You understand that Lincoln reserves the right to require the full trust document and any subsequent amendments and/or restatements.

Trustee Signature:	Trustee Name (Print - First, Middle, Last):	Date:
Trustee Signature:	Trustee Name (Print - First, Middle, Last):	Date:
Trustee Signature:	Trustee Name (Print - First, Middle, Last):	Date: