

e79233a2-6ae0-4f7e-bed9-d0a1057d8194

## **Partial Cash Withdrawal Request**

Use this form to request a partial cash withdrawal from a Universal Life or Variable Universal Life policy.

The Company indicated in this section is referred to as "the Company."

#### Things to Know Before You Begin

- Please complete this form in its entirety to avoid • any delays in processing.
- If you need assistance in completing this form, • please call the appropriate number listed under How to submit this form.

## **SECTION 1: About the Owner**



A Partial Withdrawal will lower the cash value and death benefit of your policy, may affect any policy guarantees, and may have other consequences. Please refer to your policy and/or prospectus for important information before proceeding to ensure this request is consistent with your plans.

Policy Number					
Type of Owner: 🗌 Individe	ual <sub>or</sub> 🗌 Trust/Business E	intity			
If Individual or Co-Owner:					
First Name	Middle Name	La	st Name		
Phone Number	Social Security Number	E-	Mail Address		
Co-Owner First Name	Middle Name	La	st Name		
Phone Number	Social Security Number	E-	Mail Address		
If Trust/Business Entity Ov	vner:				
Name of Trust			Date Executed (mn	n/dd/yyyy)	
Name of Business Entity			Tax ID Number of Trust/Business Entity		
Trust/Business Entity Contac	ct Person				
First Name	Middle Name Last Name				
Contact Phone Number	E-Mail Address	E-Mail Address			
Please Provide the Addres	s Where Your Proceeds Sh	ould Be S	ent:		
Number and Street/Post Offi	ce Box City		State	ZIP	
Should we use this address	for all future correspondence	? 🗌 Y	es 🗌 No		

## **SECTION 2: About the Insured**

me		

Middle	Name

Last Name

SECTION 3: About the	Withdrawal Request
----------------------	--------------------

\*If there is not sufficient value to meet the specific dollar amount requested, the largest amount available will be withdrawn.

Payment Options: Please select one of the following methods of payment:

A. Pay by check.

## B. Apply withdrawal to pay premiums on other policies as detailed below:

	Policy 1	Policy 2
Policy number		
Number of premiums to pay		
Due date of first premium		
Additional funds submitted to be applied		

If amount withdrawn exceeds amount to be applied, the excess will be sent by check. If available value is insufficient, this may result in a delay in processing.

## **C.** Apply withdrawal to pay loans as detailed below:

	Policy 1	Policy 2
Policy number		
Amount to pay loan interest		
Amount to pay loan principal		
Additional funds submitted to be applied		

If amount withdrawn exceeds amount to be applied, the excess will be sent by check. If available value is insufficient, this may result in delay of processing.

#### D. Open a new Total Control Account<sup>®</sup> Money Market Option (TCA) or deposit to my existing TCA #

\* Please see features of the Total Control Account on page 4 for information to help you make an informed decision. The decision whether or not to select a check or the TCA as a payment method is entirely yours. The features listed are merely general factual information about the TCA and do not constitute a recommendation or advice on the payment method you should select.

**Special Instructions:** 

## **SECTION 4: About Income Tax Withholding**

Under current federal income tax law, we are required to withhold 10% of the taxable portion of the cash withdrawal value and pay it to the IRS unless you tell us in writing not to withhold tax. Certain states also require us to withhold state income tax if we withhold federal tax.

You are responsible for paying income tax on the taxable portion of our payment even if we do no withholding. In making your decision about withholding, you should consider that penalties under the estimated income tax rules may apply if your withholding and estimated income tax payments are not sufficient.

**Check here** if you do not want us to withhold federal and state income tax

(This choice is void if we do not have your social security or Tax ID Number.).

## **SECTION 5: Certification and Signatures**

Under the penalties of perjury I certify:

- 1. The number shown on this form is my correct taxpayer identification number, and;
- 2. I am not subject to backup withholding because: (*a*) I am exempt from backup withholding, or (*b*) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (*c*) the IRS has notified me that I am no longer subject to backup withholding, and;

(If you have been notified by the IRS that you are currently subject to backup withholding because of under reporting interest or dividends on your tax return, you must cross out and initial this item.)

- 3. I am a U.S. citizen or other U.S. person, and;
- 4. I am not subject to FATCA reporting because I am a U.S. person and the account is located within the United States.

(If you are not a U.S. Citizen or other U.S. person for tax purposes, please cross out the last two certifications and complete appropriate IRS documentation, e.g. IRS Form W-8BEN for individuals, which can be found on the IRS website).

# The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

## Signature Requirements

All Owners are required to sign this form. Any Irrevocable Beneficiary or Collateral Assignee must sign this form. Please sign as shown below:

- A Partnership The full name of the firm should be printed with the signature of all general partners (not limited partners).
- A Sole Proprietorship The full name of the business should be printed with the signature of the owner followed by the word "owner."
- A Trust Signatures, followed by the word "Trustee," of all required Trustees. Also submit a Trust Certification, which is available from your representative, sales office, or the appropriate number listed under How to submit this form.
- A Corporation The signature and title of one officer (other than the Insured).

An Individual acting on The full name of the Owner's fiduciary or agent and the legal documentation of the behalf of the Owner authority to act (*e.g.*, *power of attorney*, *guardianship papers*, *etc.*)

Sign Signature of Owner Here			Date ( <i>mm/dd/yyyy</i> )
Title (If you are acting in a representative capacity)			
Print Name of Individual S	igning -		
First Name	Middle Name	Last Name	
Signed at City			State
Sign Signature of Co-Owner Here		Date (mm/dd/yyyy)	
Title (If you are acting in a representative capacity)			
Print Name of Individual Signing -			
First Name	Middle Name	Last Name	
Signed at City	1		State

For Sales Office Use Only	Sales Office/Agency Number – F	Representative ID	Date ( <i>mm/dd/yyyy</i> )
Sales Representative – First Name	Middle Name	Last Name	

## **SECTION 6: How to Submit This Form**

Return pages 1 through 4 of the completed form to the address or fax number listed below for the Company that issued the policy. If policies are issued by more than one Company, return one completed form to any Company that issued at least one of the policies.

Mail:	Phone:	Fax:	Email:
Variable Universal Life policies P.O. Box 390 Warwick, RI 02887-0392 Universal Life policies P.O. Box 391 Warwick, RI 02887-0391	1-800-638-5000	All Life policies 1-401-827-2225	INDLifeRequests@metlife.com

## **SECTION 7: About Payment Options**

**TOTAL CONTROL ACCOUNT (TCA)** - Please keep this page for your records.

If payment is made by establishing a new TCA, the signature you provide will be placed on file with that account.

#### Availability:

A TCA may be elected when the amount payable to you is at least \$10,000, or you have an existing TCA Account issued by the same MetLife affiliated insurance company that issued the policy (*you must provide the TCA Account number*). The TCA generally is not available to corporate entities, or to residents of foreign countries. For more information, call our Customer Service Center at 1-800-638-7283.

#### Features:

- **Interest compounded daily.** Rates are set weekly and are equal to or higher than one of two nationally recognized money market rate indexes. Interest is credited monthly and is currently taxable.
- Free unlimited check writing privileges Minimum check amount \$250.
- No penalties for withdrawing all or part of your money.
- Detailed, easy-to-read statements.
- No charge for processing or printing checks. Free check reorders.
- No transaction or monthly fees, although there may be charges for stop orders and special services.
- Additional amounts from other sources may not be added to the TCA, nor can amounts withdrawn be redeposited. However, proceeds from other life insurance policies and annuity contracts issued by the same insurer may be added to an existing TCA in some circumstances.
- Information available electronically through MetLife's eSERVICE web site.