



# Indexed Annuity Application

F&G Secure Landing<sup>SM</sup> 7

INSURER: **Fidelity & Guaranty Life Insurance Company**  
Home Office: 801 Grand Ave, Suite 2600, Des Moines, IA  
Administrative Office: P.O. Box 81497; Lincoln, NE 68501-81497  
Phone: 800.445.6758

## 1. Owner(s)

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

Address: \_\_\_\_\_

☐ Male ☐ Female Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Identification No.: \_\_\_\_\_ State: \_\_\_\_\_

Type of Identification: ☐ State Issued ☐ Immigration ☐ Military ☐ Passport

### Joint Owner (if applicable)

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

Address: \_\_\_\_\_

☐ Male ☐ Female Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Identification No.: \_\_\_\_\_ State: \_\_\_\_\_

Type of Identification: ☐ State Issued ☐ Immigration ☐ Military ☐ Passport

Relationship to Owner: \_\_\_\_\_

## 2. Annuitant(s) ☐ Check if Annuitant is same as Owner

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

Address: \_\_\_\_\_

☐ Male ☐ Female Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Identification No.: \_\_\_\_\_ State: \_\_\_\_\_

Type of Identification: ☐ State Issued ☐ Immigration ☐ Military ☐ Passport

Relationship to Owner: \_\_\_\_\_

### Joint Annuitant (if any) ☐ Check if Joint Annuitant is same as Joint Owner

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

Address: \_\_\_\_\_

☐ Male ☐ Female Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Identification No.: \_\_\_\_\_ State: \_\_\_\_\_

Type of Identification: ☐ State Issued ☐ Immigration ☐ Military ☐ Passport

Relationship to Owner: \_\_\_\_\_

Fidelity & Guaranty Life Insurance Company, Des Moines, IA

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## 3. Beneficiary

Please select Primary or Contingent Beneficiary for each beneficiary listed. If not selected, Primary will be default. The percentage for all Primary beneficiaries must total 100%. The percentage for all Contingent beneficiaries must total 100%. All percentages must be in whole numbers. If Beneficiary percentages are not specified, all beneficiaries within a beneficiary type will share equally. Additional beneficiaries, if any, can be listed on a separate document and submitted with this application.

The proposed Owner agrees that, in the event of their death before the annuity contract is issued and/or delivered, the beneficiary designation below shall be treated as a transfer-on-death designation for the premium intended for this annuity contract.

1. Name: \_\_\_\_\_ ☐ Primary ☐ Contingent

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Beneficiary % \_\_\_\_\_

Relationship to Owner: \_\_\_\_\_

2. Name: \_\_\_\_\_ ☐ Primary ☐ Contingent

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Beneficiary % \_\_\_\_\_

Relationship to Owner: \_\_\_\_\_

3. Name: \_\_\_\_\_ ☐ Primary ☐ Contingent

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Beneficiary % \_\_\_\_\_

Relationship to Owner: \_\_\_\_\_

4. Name: \_\_\_\_\_ ☐ Primary ☐ Contingent

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Social Security Number or Tax ID No.: \_\_\_\_\_

Beneficiary % \_\_\_\_\_

Relationship to Owner: \_\_\_\_\_

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## 4. Plan Type and Premium

### Plan Type

☐ Nonqualified ☐ Traditional IRA ☐ Roth IRA ☐ SEP IRA ☐ Inherited IRA ☐ Tax-Sheltered Annuity  
(Funding Vehicle Only)

☐ Other (specify plan type): \_\_\_\_\_

☐ Contribution IRA Tax Year: \_\_\_\_\_ Contribution Amount: \_\_\_\_\_

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Premium - Please make check(s) payable to Fidelity & Guaranty Life Insurance Company

Total Cash Amount (Check/ACH/DTCC Settlement)	\$
Anticipated total amount from Exchange(s)/Transfer(s)/Rollover(s) to be requested by F&G	\$
Anticipated total amount from Exchange(s)/Transfer(s)/Rollover(s) to be requested by Agent or Owner	\$
<b>Total Estimated Premium</b>	<b>\$</b>

### 5. Riders – Note riders may have additional charges and fees.

Minimum Interest Crediting Rider: ☒ Yes ☐ No

Return of Premium Rider: ☒ Yes ☐ No

### 6. Special Instructions

### 7. Interest Crediting Strategies

Interest Crediting Strategies		Allocations must be in whole numbers and total 100%. Minimum \$2,000 per option.
One-Year Point-to-Point with Cap	S&P500®	1 Year _____ %
One-Year Point-to-Point with Participation Rate	S&P500®	1 Year _____ %
One-Year Point-to-Point Performance Trigger	S&P500®	1 Year _____ %
One-Year Point-to-Point with Participation Rate	BA5	1 Year _____ %
One-Year Point-to-Point Performance Trigger	BA5	1 Year _____ %
One-Year Fixed Interest		_____ %
<b>Total</b>		<b>100%</b>

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## 8. Acknowledgements, Agreements and Signatures

**Replacement** - If either of the following questions is answered "Yes", please complete and submit the state-specific replacement form.

1. Do you have an existing life insurance policy or annuity contract? ☐ Yes ☐ No
2. Will the annuity applied for replace or change an existing life insurance policy or annuity contract? ☐ Yes ☐ No

I (We) have read the statements made in this application. To the best of my (our) knowledge and belief, the statements made are complete, true, and correctly recorded. I (We) understand that: a copy of this application may form a part of any annuity issued; the annuity will not take effect until delivered to the Owner; no agent has the authority to modify any annuity issued; and **there are terms, conditions, charges, and fees for any optional rider selected.**

**I (We) understand that I (We) have applied for an indexed annuity. I (We) have received a copy of Fidelity & Guaranty Life Insurance Company's disclosure material for this annuity. I (We) understand that: while the values of the annuity may be affected by an external index, the annuity does not directly participate in any stock, bond, or equity investments; any values shown, other than guaranteed minimum values, are not guarantees, promises or warranties; and the annuity describes how the minimum guaranteed surrender values and indexed interest credits are calculated.**

**I (We) understand that Fidelity & Guaranty Life Insurance Company offers indexed annuity products with different features and benefits. I (We) can also apply for any of those products by contacting Fidelity & Guaranty Life Insurance Company or one of its agents.**

**If the annuity is issued with a market value adjustment, the cash surrender values may increase or decrease based on a market value adjustment prior to the date or dates specified in the annuity; the market value adjustment applies when the surrender charge applies.**

I (We) certify, under penalties of perjury, that I am a (we are) United States Citizen(s) or resident(s) of the United States (includes United States resident aliens) and that the taxpayer identification number(s) is (are) correct. I (We) understand that federal law requires all financial institutions to obtain identity information in order to verify my (our) identity(ies) and I (we) authorize its use for this purpose. This information includes, but is not limited to, the name(s), residential address(es), date(s) of birth, Social Security or taxpayer identification number(s), and any other information necessary to sufficiently verify identity(ies). Third party sources may be used to verify the information provided.

**Fraud Warning Notice: Any person who knowingly presents a false statement in an application for insurance may be guilty of a criminal offense and subject penalties under state law.**

Signed at: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Owner: \_\_\_\_\_

Signature of Joint Owner (if applicable): \_\_\_\_\_

Signature of Annuitant (if different than Owner): \_\_\_\_\_

Signature of Joint Annuitant (If applicable): \_\_\_\_\_

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## Annuity Application

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### 9. Agent Certification

Does the applicant have an existing life insurance policy or annuity contract? ☐ Yes ☐ No

To the best of your knowledge, does this application replace or change existing life insurance policy or annuity contract?  
☐ Yes ☐ No

**I certify that the application was signed and dated by the Owner(s). I certify that all the Company's disclosure material has been presented to the applicant and a copy was provided to the applicant. I have not made any statements which differ from this material nor have I made any guarantees or promises about the expected future values of the annuity. I have received a copy of, have carefully read and complied with the applied for annuity's training manual.**

**I have verified the identity of the Owner, Joint Owner, Annuitant and Joint annuitant through an examination of a state or federal government photo identification card provided by the Owner, Joint Owner, Annuitant or Joint Annuitant such as a driver's license or passport.**

I have truly and accurately recorded on this application the information provided by the applicant.

Primary Agent: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

F&G Agent No.: \_\_\_\_\_

Split% (if <100%): \_\_\_\_\_ Agent Phone No.: \_\_\_\_\_

Agent Email: \_\_\_\_\_

Commission Option Elected: ☐ Heaped ☐ Trail

### ADDITIONAL PRODUCER(s)

1. Agent Name: \_\_\_\_\_

F&G Agent No.: \_\_\_\_\_

Split% (if <100%): \_\_\_\_\_ Agent Phone No.: \_\_\_\_\_

Agent Email: \_\_\_\_\_

Commission Option Elected: ☐ Heaped ☐ Trail

2. Agent Name: \_\_\_\_\_

F&G Agent No.: \_\_\_\_\_

Split% (if <100%): \_\_\_\_\_ Agent Phone No.: \_\_\_\_\_

Agent Email: \_\_\_\_\_

Commission Option Elected: ☐ Heaped ☐ Trail

3. Agent Name: \_\_\_\_\_

F&G Agent No.: \_\_\_\_\_

Split% (if <100%): \_\_\_\_\_ Agent Phone No.: \_\_\_\_\_

Agent Email: \_\_\_\_\_