

**This form is used to:**

- Establish ongoing automatic payout from a Thrivent Mutual Fund to pay the premium or loan repayment of another Thrivent product.

**Important notes:**

- If this form is incomplete or not legible when returned, your request may be delayed.
- Once this transaction has been processed, it cannot be **reversed**.
- Read and understand the entire form and instructions before completing. Questions regarding this form may be directed to the **Customer Interaction Center at: 800-847-4836**.
- Send completed forms:
  - Fax to: 800-225-2264
  - Or mail to:  
Thrivent Financial for Lutherans  
Attn: Payment Services  
4321 N. Ballard Road  
Appleton, WI 94919
- For your own security, do not e-mail the completed forms to Thrivent. E-mailed forms will not be accepted.
- Any increase/decrease in premium will automatically be adjusted and appropriately distributed as such from the corresponding mutual fund account.
- Distributions from a mutual fund account(s) may result in a taxable event.

**Page 1 Part A – General Information**

- Provide a Thrivent ID: this is a nine digit identifier that starts with a 5, unique to each Thrivent member/shareholder. If you are unsure of the Thrivent ID, contact the Customer Interaction Center.
- Select the product the premium will be paid **From**: Settlement Options, Single Premium Immediate Annuity, Mutual Funds.
- Choose One:
  - **Pay initial and subsequent premium payments:** Select this box if you want your first premium payment as well as all future premiums to be paid from this account.
  - **Pay only subsequent premium payments:** Select this box if you only want future premiums to be paid from this account and will pay the initial premium via another method.
- **Name of Payee:** Provide information of the mutual fund account owner; include name, address, phone number, social security/tax identification number and fund/account number.

**Part 1 Part B – Contracts to be paid information**

- Enter the name of owner on the contract and the contract number to be paid. If more than one contract will be paid, each contract should be put in a separate section.
- Choose a box selecting the type of payment: Premium, Loan or PUIO/APO.
- Indicate the dollar amount to be withdrawn from the mutual fund account (which may or may not be the same as the premium amount due).
  - If taxes are withheld on an IRA account, it is important to reference a dollar amount that includes the premium payment **plus** the percentage or dollar amount of taxes to be withheld, as withholding is taken from the distribution amount requested.
- Indicate the frequency for how often the dollars must withdraw from the mutual fund account in order to pay the premium (choose either monthly, quarterly, semi-annually or annually).
- Indicate the date in which you wish to start the withdrawal from the mutual fund account; taking into consideration to choose a date at least a couple days prior to the premium due date.

## Page 2 – Withholding

If the mutual fund account is an IRA, your request will be subject to Federal and potentially State Income Taxes. By **not checking** any box, Thrivent will withhold 10% federal and possibly state income taxes.

- Check one of the following boxes indicating a Federal Tax Withholding option:
  - **Do not withhold for federal income tax:** Taxes will not be taken from the distribution amount requested.
  - **Withhold federal income tax at a rate of 10%:** 10% will be withheld from the distribution amount requested unless another percentage greater than 10 is indicated.
  - **Withhold federal income tax amount of \$ \_\_\_\_\_:** A specific dollar amount greater than 10% of the distribution amount may be indicated and will be taken from the amount requested.
- If federal income taxes are withheld, certain states also impose a required state income tax to be withheld. See the form or contact your tax advisor to see if you reside in a state that requires this. Note: If federal income taxes are not withheld, state taxes will not be withheld.
- Federal taxes and applicable state taxes are taken from the distribution amount requested unless indicated on the form to take withholding over and above the distribution amount.

## Signatures

- Signature(s) of all mutual fund account owner(s) required to complete this request.
- If there are more than two owners of the mutual fund, more than one signature per box is acceptable.