

Cary A. Levinson & Associates,Inc Life Brokerage Services 5551 N. University Drive, Suite 201 Coral Springs, FL 33067 800-375-2279

AGENT OR AGENCY BIOGRAPHICAL INFORMATION FOR CONTRACT APPLICANT
This form must accompany all contracts submitted to Banner Life Insurance Company.

Please print or type all information in BLACK ink only.

Section I - CONTRACT TYPE.				
Please check only one. Contract is for: □ corporation - complete all sections e □ individual - complete sections I, IIA, □ individual - but "doing business as" o □ individual - but "selling through a firm agency" complete sections, I, IIA, IIE	IV and V complete all sec	ctions except IIB dependent broker dealer,	bank, wirehc	ouse or P&C
Section IIA - INDIVIDUAL APPLICANT	OR CORPOR	RATE PRINCIPAL REQ	UIRED INFO	ORMATION.
Social Security Number:		Sex: ☐ Male ☐ Fen	nale	
Required Name:				
Last		First		Middle Initial
Date of Birth:		E-mail Address:		
Business Phone:		Fax No.:		
Business Name:				
Business Address:				
Street	Suite Number	City	State	Zip
Home Address:	Ant Number	City	State	Zip
Home Phone:		Web Site Address:		•
☐ I am an officer of the corporation in Secti	ion III.			
Section IIB - FIRM REQUIRED INFORM				
Firm Name:		Firm Tay ID Number:		
Firm Type: ☐ Broker Dealer ☐ Bank		e ⊔ P&C Agency ⊔	Other	
Firm Address: Street	Suite Number	City	State	Zip
Section III - CORPORATE APPLICANT				
NOT COMPLETE THIS SECTION.				
Tax ID Number:				
Required				
Corporate Name:				
Corporate Phone:		Corporate Fax No.:		
Corporate Address:	Suite Number	City	State	Zip
Corporate E-mail Address:		Web Site Address:		•
Primary Principal for Corporate Records:				
Background information reported on page 2 s				
Additional Principals:	·			
Office Manager or Primary Contact:		Phone No.	:	
Toll-Free Number for Client Calls:				

Please attach a copy of your license(s) for your state of residence and any other states where you plan to do business with Banner. Please complete the second page of this form as well.

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Incomplete information will delay contracting.

Section IV - BACKGROUND INFORMATION REQUIRED FROM ALL APPLICANTS.

Please provide a detailed letter of explanation for any "yes" answers below. If this is a corporate application, the questions should be answered by the agency principal.

c. any violation of federal or state securities or investment related regulations? Nes Ne S. Are you now or have you ever been the subject of any insurance or investment related customer complaint, investigation or proceeding? Yes Ne Have you ever had your contract or appointment terminated or refused by any insurance or financial services company? Yes Ne Have you ever had a license denied, revoked or suspended by any Securities and/or State Insurance Department? Yes Ne Have you used any other names or aliases? Yes Ne Remarks: Yes Ne Yes Ne Current or previous employer: Are you now or have you ever been contracted or otherwise associated with Banner Life? Yes No If Yes, please provide details including agent # and agency name: Yes No If Yes, please provide details including agent # and agency name: Policy No. E&O Carrier: Policy No. E&C Carrier: Policy No. Effective Date: Expiration Date: I hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k horeby authorize Banner Life to conduct a background investigation on me, including a review of credit worthing now or at any time. I understand that information may be obtained through written correspondence, persona telephone interviews with family, friends, neighbors, business associates or other acquaintances, companies I howered for or with whom I have been contracted, and any other persons or organizations contracted to supply sinformation. I also understand and acknowledge that information received by Banner Life may be shared with general agencies indicated below and I hereby expressly consent to the sharing of such information with the gen agencies indicated below and I hereby expressly consent to the sharing of such information with the gen agencies indicated below and I hereby expressly to regard to the sharing of such information with the gen agencies indicated below and I hereby expressly to regard a email. I further hereby cer	 Do you have any unsatisfied judgments, garnishments or liens Are you in debt to any insurance company? Have you ever filed for or been declared bankrupt or insolvent Have you ever been charged with, convicted of, or plead no coa. any felony or misdemeanor? any violation of any state insurance regulations or statutes 	☐ Yes ☐ Yes ☐ Yes ☐ Yes ☐ Yes ☐ Yes	□ No □ No □ No □ No □ No			
Customer complaint, investigation or proceeding? 6. Have you ever had your contract or appointment terminated or refused by any insurance or financial services company? 7. Have you ever had a license denied, revoked or suspended by any Securities and/or State Insurance Department? 8. Have you used any other names or aliases? Current or previous employer: Are you now or have you ever been contracted or otherwise associated with Banner Life? Ves No rewilliam Penn? Yes No or William Penn? Yes No if Yes, please provide details including agent # and agency name: Do you have Errors and Omissions coverage? Policy No: Effective Date: Effective Date: Effective Date: Effective Date: Effective Date: Ihereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k hereby authorize Banner Life to conduct a background investigation on me, including a review of credit worthine now or at any time. I understand that information may be obtained through written correspondence, persona telephone interviews with family, friends, neighbors, business associates or other acquaintances, companies I h worked for or with whom I have been contracted, and any other persons or organizations contracted to supply s information. I also understand and acknowledge that by providing an email address I am permitting Company to share select business communications with me via email. I further hereby certify that if this applica is approved, I will comply with all the terms and conditions of the Company's Agent/Agency Agreement, includ but not limited to, the terms and conditions therein relating to the Company's Privacy Policy. A photocopy of authorization shall be as valid as the original. Print Name: Section V - AGENCY HIERARCHY STRUCTURE. I certify that I have reviewed this candidate's information and recommend him/her for contracting. Please appoint	c. any violation of federal or state securities or investment rel	ated regulations?	☐ Yes	□ No		
financial services company? - Have you uver had a license denied, revoked or suspended by any Securities and/or State Insurance Department? - Have you used any other names or aliases? - Current or previous employer: - Are you now or have you ever been contracted or otherwise associated with Banner Life? - Yes No or William Penn? Yes No - Mrey on you have Errors and Omissions coverage? Yes No - Mrey on you have Errors and Omissions coverage? Yes No - Mrey on you have Errors and Omissions coverage? Yes No - Mrey on you have Errors and Omissions coverage? Yes No - Wes Policy No. - Effective Date: Expiration Date: - I hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k hereby certify that all the information may be obtained through written correspondence, persona telephone interviews with family, friends, neighbors, business associates or other acquaintances, companies I have been contracted, and any other persons or organizations contracted to supply s information. I also understand and acknowledge that information received by Banner Life may be shared with general agencies indicated below and I hereby expressly consent to the sharing of such information with the gen agencies indicated below and hereby expressly consent to the sharing of such information with the gen agencies indicated below and hereby expressly consent to the sharing of such information with the gen agencies indicated below and hereby expressly consent to the sharing of such information with the gen agencies indicated below and hereby expressly consent to the sharing of such informat	customer complaint, investigation or proceeding?			□ No		
Remarks: Yes No No Remarks:	financial services company?	□ Yes	□ No			
Remarks: Current or previous employer: Are you now or have you ever been contracted or otherwise associated with Banner Life?				□ No		
Are you now or have you ever been contracted or otherwise associated with Banner Life? Yes No or William Penn? Yes No No william Penn? Yes No No Yes, please provide details including agent # and agency name:		<u> </u>				
or William Penn?	Current or previous employer: Are you now or have you ever been contracted or otherwise as	ssociated with Banner Life?	Yes 🗆	No		
Do you have Errors and Omissions coverage?	or William Penn? ☐ Yes ☐ No					
If you are a general agent, does your E&O policy cover agent/broker activity?	If Yes, please provide details including agent # and agency nar	me:				
Effective Date:			0			
I hereby certify that all the information given to Banner Life by me is true and correct without any omissions of any k I hereby authorize Banner Life to conduct a background investigation on me, including a review of credit worthing now or at any time. I understand that information may be obtained through written correspondence, persona telephone interviews with family, friends, neighbors, business associates or other acquaintances, companies I hworked for or with whom I have been contracted, and any other persons or organizations contracted to supply sufformation. I also understand and acknowledge that information received by Banner Life may be shared with general agencies indicated below and I hereby expressly consent to the sharing of such information with the general agencies indicated below. I understand and acknowledge that by providing an email address I am permitting Company to share select business communications with me via email. I further hereby certify that if this application is approved, I will comply with all the terms and conditions of the Company's Agent/Agency Agreement, includibut not limited to, the terms and conditions therein relating to the Company's Privacy Policy. A photocopy of authorization shall be as valid as the original. Print Name: Section V - AGENCY HIERARCHY STRUCTURE. I certify that I have reviewed this candidate's information and recommend him/her for contracting. Please appoint	E&O Carrier: F	Policy No.:				
I hereby authorize Banner Life to conduct a background investigation on me, including a review of credit worthine now or at any time. I understand that information may be obtained through written correspondence, persona telephone interviews with family, friends, neighbors, business associates or other acquaintances, companies I hworked for or with whom I have been contracted, and any other persons or organizations contracted to supply sinformation. I also understand and acknowledge that information received by Banner Life may be shared with general agencies indicated below and I hereby expressly consent to the sharing of such information with the general agencies indicated below. I understand and acknowledge that by providing an email address I am permitting Company to share select business communications with me via email. I further hereby certify that if this application approved, I will comply with all the terms and conditions of the Company's Agent/Agency Agreement, includibut not limited to, the terms and conditions therein relating to the Company's Privacy Policy. A photocopy of authorization shall be as valid as the original. Print Name: Section V - AGENCY HIERARCHY STRUCTURE. I certify that I have reviewed this candidate's information and recommend him/her for contracting. Please appoint	Effective Date: E	Expiration Date:				
Signature:	I hereby authorize Banner Life to conduct a background investion ow or at any time. I understand that information may be obtatelephone interviews with family, friends, neighbors, business a worked for or with whom I have been contracted, and any other information. I also understand and acknowledge that informat general agencies indicated below and I hereby expressly conseagencies indicated below. I understand and acknowledge that Company to share select business communications with me via approved, I will comply with all the terms and conditions of the but not limited to, the terms and conditions therein relating to	gation on me, including a review of tained through written correspond ssociates or other acquaintances or persons or organizations contraction ion received by Banner Life may ent to the sharing of such information to by providing an email address I a email. I further hereby certify that the Company's Agent/Agency Agr	f credit wo dence, pe , compan cted to su be shared on with the am permat if this a reement,	orthiness, ersonal or ies I have pply such d with the egeneral nitting the pplication including,		
Section V - AGENCY HIERARCHY STRUCTURE. I certify that I have reviewed this candidate's information and recommend him/her for contracting. Please appoint with commission addendum who reports to BDGA (if any): Name Code # Code # who reports to BMGA (if any): Name Code # Code # who reports to GA (required): Name Code # Code # Code # who reports to GA (required): Name Code #						
I certify that I have reviewed this candidate's information and recommend him/her for contracting. Please appoint with commission addendum who reports to BDGA (if any): Name Code # Code # who reports to BMGA (if any): Name Code # Code # who reports to GA (required): Name Code # Code # Code # who reports to GA (required): Name Code #	Signature:	Date:				
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who reports to BMGA (if any): Name Code # Who reports to GA (required): Name Code #	who reports to BDGA (if any): Name Code #					
who reports to GA (required): Name Code #	ho reports to BEGA (if any): Name Code #					
	who reports to BMGA (if any): Name Code #					
Signature of GA Date	who reports to GA (required): Name	Code #				
	Signature of GA	Date				

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☐ Assignment of Commission form attached. (Assignee must be appointed by Banner Life.)



AGENT / AGENCY / INSTITUTION COMMISSION PAYMENT PROFILE

Please print or type all information in **BLACK ink only**. Section 1 - IDENTIFICATION INFORMATION Agent/Agency/Institution Name S.S.N. and/or Tax ID # Section 2 - INSTRUCTIONS Please complete this form to select your commission payment options including direct deposit electronic funds transfer (EFT), then return it to the Licensing Department. Commission Payment Frequency Daily (EFT required) ☐ Weekly (EFT required) ☐ Standard Method (three times each month) ☐ Bi-Weekly (26 times per year) ☐ Monthly (Note: Minimum must be at least \$50.) Minimum Transaction Amount ☐ E-mail □ Website Commission Reporting Options E-mail Address ☐ Direct Deposit (EFT) ☐ Check Commission Payment Method PLEASE ATTACH A VOIDED CHECK TO THIS AUTHORIZATION FOR THE CHECKING ACCOUNT REFERENCED BELOW Section 3 - BANK INFORMATION Please begin the deposit of my NET EARNINGS to the below account. PLEASE ALLOW 30 DAYS TO START NEW DEPOSITS FINANCIAL INSTITUTION: BRANCH ADDRESS: _____ TRANSIT ROUTING NUMBER ACCOUNT NUMBER Section 4 - AUTHORIZATION I understand all earnings for all agent numbers associated with the above S.S.N. and/or Tax I.D. number will be processed according to these instructions. If I have selected direct deposit of net earnings in Section 3 above, then I agree to the following: I authorize Legal & General America and its subsidiaries to deposit commission earnings automatically to the account specified above as they become due and payable, by initiating credit entries to my account electronically or by any other commercially accepted method, and I authorize the financial institution named above to credit the same to my account. If funds to which I am not entitled are deposited to my account, I authorize the financial institution to debit the same to my account. This authority will remain in effect until Legal & General America and its subsidiaries has received written notice from me of its cancellation in such time and manner as to afford Legal & General America and its subsidiaries and the financial institution reasonable opportunity to act on it. Further, I understand a statement of funds deposited will be sent to my e-mail address of record if e-mail commission reporting option is selected above. Otherwise, commission statements will only be available at the LGAmerica website. Further, I understand service charges may be associated with my account and I should contact my financial institution to determine these charges. I also understand that Legal & General America and its subsidiaries is not responsible, in any way, for these service charges. Date _____ Signature___



Agent/Broker Agreement Adoption Authorization

Please print or type all information in **BLACK ink only**.

In consideration of the covenants contained in the Banner Life Agent/Broker Agreement (AB-20 AB Agreement (03/09)), this ADOPTION AUTHORIZATION is executed as set forth below by and among Banner Life Insurance Company, called the Company, the General Agent and the Agent/Broker.

All of the parties hereto acknowledge that they have received and read the Banner Life Agent/Broker Agreement (AB-20 AB Agreement (03/09)).

IN WITNESS WHEREOF, the parties hereto have signed this ADOPTION AUTHORIZATION and agree it is effective as of the date authorized by the Company, i.e, The Contract Date.

Agent/Broker	General Agent
Print Name of Agent/Broker	Print Name of General Agent
Print Name & Title of Principal or Authorized Office Agent/Broker, if applicable	Print Name & Title of Principal or Authorized Officer for General Agent, if applicable
Signature of Agent/Broker or Principal or Authoriz Officer for Agent/Broker	zed Signature of General Agent or Principal or Authorized Officer for General Agent
Date Signed	Date Signed
Banner Life Insurance Company	
Patrick Bowen	
Print Name	
Interim SVP, Sales and Marketing	
Title	
Signature Date Signature	 ned



1701 Research Boulevard Rockville, Maryland 20850 (301) 279-4800 (800) 638-8428

ASSIGNMENT OF AGENT/BROKER/GENERAL AGENT FIRST YEAR AND RENEWAL COMMISSIONS

	, do hereby sell, assign, transfer, set over and convey
(Agent/Broker/General Agency Name)	
to	ofall o
(Print Name)	(City, State)
my right, title, interest, claim or demand in and to any and all f	irst year and renewal commissions including service fees
if any, for all policies due or to become due and payable to m	e by BANNER LIFE INSURANCE COMPANY, under the
Agent/Broker/General Agency number	(or if a number has not been issued, write
"Pending" above and provide the date you signed your Banne	er Life Agreement). (Agent/Broker/General Agency Agreement Date)
l understand that this assignment will remain in force and be e	• • •
for which it is given to secure is filed by said assignee with s	
is authorized and empowered to pay to said assignee the con	nmissions covered hereby as and when the same become
due and payable under said contract and said Insurance Con	npany is released of and from all other and further liabilities
by reason of payments made to said assignee by virtue her	eof.
by reason of payments made to said assignee by virtue her	eof.
by reason of payments made to said assignee by virtue her Agent/Broker/General Agent Authorization	eof.
	Print Name and Title of Principal or Authorized
Agent/Broker/General Agent Authorization	

This Addendum is made, entered into, and effective the date hereinafter specified by and between Banner Life Insurance Company (hereinafter called the Company), the Agent/Broker signing this agreement (hereinafter called the Agent/Broker), and the Brokerage General Agent (BGA) as Guarantor. It is agreed by and between the parties as follows:

1. Agent/Broker Agreement

This Addendum shall be an amendment to the Agent/Broker Agreement entered into between the Agent/Broker, the General Agent and the Company. The effective date shall be when the Addendum is approved, signed and dated in the Home Office of the Company. This Addendum supersedes and cancels all previous advance commission agreements, however, any balance due the Company will remain due and payable to the Company under terms of the previous advance commission agreements.

2. Advance Commission

The Company will prepay seventy-five percent (75%) of first year commissions due on life insurance policies sold by the agent/broker, submitted within two years from the effective date of this Addendum. The twenty-five percent (25%) remaining first year commission will be paid on an earned basis upon receipt of the tenth, eleventh and twelfth months premium.

3. Advance Commission Eligibility

Only policies issued on applications received at the Home Office of the Company after the date the Company has approved this Advance Commission Addendum are eligible for advance commission payments.

Advance commission is available on individual life insurance plans that have recurring premiums paid under a monthly pre-authorized check plan. For universal life insurance plans advance commission is available on the planned premium up to the target premium. Specifically excluded from advance commission eligibility are annuities, Universal life premium in excess of target premium, single premium life insurance, controlled business (all family members and business partners), additional deposits received in conjunction with the sale of individual life insurance and annuity policies (hereinafter called "New Business").

Premiums paid on a premium mode other than Pre-Authorized Checking (PAC) are not eligible for advance commissions.

4. Background Investigation

The undersigned hereby authorizes the Company to conduct an investigation concerning character, credit, reputation and personal traits and releases those contacted and the Company from any liability with respect to the content of the information provided and any resulting action by the Company including the sharing of such information or the termination of this advance commission agreement.

5. Production Commitment

To qualify for and to maintain the Advance Commission Addendum, the Agent/Broker commits to sell on behalf of the Company life insurance policies with at least a total of \$5,000 of paid annualized premium (including PAC, quarterly, semi-annual and annual payment modes) each year on a monthly pro-rata basis. If the Agent/Broker does not perform to the above production commitment, the Company may choose to exercise its right to terminate this Addendum.

AB-ACA (11/05) Page 1 of 3

6. Payments and Loan Status

All advances will be made upon full payment of the first modal premium and the cash payment of said advance will become a loan to the agent/broker to the extent of the amount advanced.

7. Advance Commission Amount Limitations

Advance commission is limited to \$2,500 for any one policy and limited to a maximum advance balance of \$25,000 on all policies issued and paid.

8. Loan Interest After Demand for Repayment

It is understood and agreed that any prepayment of monies or commissions advanced shall create indebtedness to the Company. If payment in full is demanded, or if a repayment schedule is implemented under any provision herein, the undersigned agrees to pay interest on the unpaid balance of the loan at a rate of prime + 2% annually, calculated from the date the loan was originally made to the date the loan is finally repaid. For the applicable prime rate, the Company will refer to Wachovia Bank, N.A., or any other banking institution it may choose in its sole discretion.

9. Collection Costs

If repayment is not made as provided above, the Agent/Broker authorizes any attorney of any court of record in the United States to appear and confess judgment against said Agent/Broker in favor of the Company for the unpaid balance due under this advance commission addendum, including interest, costs and attorney's fees.

10. Assignment of Assets

The Agent/Broker specifically recognizes that the confession of judgment provision in the above paragraph will constitute an assignment against his personal assets and earnings from any source whatsoever.

11. Termination of Addendum

The Company shall have the right, with or without cause, to terminate this Addendum at any time by written notice to the last known address of the Agent/Broker. The Agent/Broker or the BGA can terminate this addendum at any time with written notice to the Company. Should this Addendum or the agreement to which it is endorsed be cancelled, an amount equal to any and all unearned prepaid commissions will be immediately, and on demand, payable to the Company.

Termination of this Addendum does not itself terminate the agreement to which it is an Addendum. However, termination of the agreement terminates this advance commission Addendum and notice with respect to termination of this Addendum is specifically not required.

12. Indebtedness

The Agent/Broker, by this agreement, agrees that the Company shall have first lien on any and all Agent/Broker commission accounts, and that the Company has a prior right of offset to the extent of any and all unearned prepaid commissions.

13. Modifications

The Company retains the right to modify this Addendum from time to time and both the Agent/Broker and the guarantor agree to comply with the modifications.

14. Maturity Date, Extension and Fee

This Addendum will mature 24 months from the effective date. Commissions payable based upon policies issued on applications received after the maturity date are not eligible for advance commission.

The Company, at its sole option, may extend the maturity date for additional 24 month periods. Should the Company extend the maturity date an advance commission fee equal to 2.5% of the first year paid annualized premium will be automatically deducted from Agent/Broker commission.

15. Disqualification of Individual Policies

Those policies on which the Company receives insufficient payment are not eligible for advance commission and any commissions will be credited on an earned basis. Any policy may be disqualified from being eligible for advance commission at the sole discretion of the Company.

16. Errors and Omissions Coverage

The Agent/Broker is required to maintain Errors & Omissions (*E&O") liability insurance coverage during the term of this Addendum and shall provide the Company with proof of coverage upon request. The minimum amount of Errors & Omissions coverage required shall be \$1,000,000 (One Million Dollars). This dollar amount may be changed by the Company with written notice to the Agent/Broker. The Agent/Broker shall inform the Company of any changes in E&O coverage within 60 days of the change. Changes include, but are not limited to, E&O coverage that falls below the minimum amount required, any lapse, cancellation, or termination of E&O coverage, and any restriction(s) placed on the E&O policy by an E&O carrier. The Company may terminate an Advance Commission Addendum at any time if Agent/Broker's E&O coverage does not meet the minimum amount required.

Page 3 of 3



Advance Commission Addendum Adoption Authorization

In consideration of the covenants contained in the Banner Life Advance Commission Addendum (AB-ACA), this Adoption Authorization is executed as set forth below by and among Banner Life Insurance Company, called the Company, and the General Agent and the Agent/Broker.

All of the parties hereto acknowledge that they have received, read, and agreed to the Banner Life Advance Commission Addendum (AB-ACA).

IN WITNESS WHEREOF, the parties hereto have signed this Adoption Authorization and agree it is effective as of the date authorized by the Company, i.e., The Contract Date.

Agent/Broker Acceptance	
Print Name of Agent/Broker	Signature of Agent/Broker or Principal or Authorized Officer for Agent/Broker
Date Signed	Print Name and Title of Principal or Authorized Officer for Agent/Broker, if applicable
Brokerage General Agent as Guarantor Accept	ance and Authorization
may from time to time advance to the Agent/Broker,	e repayment to the Company any and all sums, which the Company named above in accordance with the terms of the above Advance Company has the right to offset any such unrecovered advances ble from the Company to the BGA.
Print Name of BGA	Signature of BGA, or Principal or Authorized Officer for BGA
Date Signed	Print Name and Title of Principal or Authorized Officer for BGA, if applicable
Banner Life Insurance Company Acceptance	
Print Name and Title of Authorized Officer	<u> </u>
Signature of Authorized Officer	Date Signed



Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. 2 Business name/disregarded entity name, if different from above								
Print or type See Specific Instructions on page	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: Individual/sole proprietor or C Corporation S Corporation Partnership Trust/estate single-member LLC				4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any)				
single-member LLC Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. Other (see instructions)					A repo	rting			
r E		Other (see instructions) ▶			(Applies t	to accounts	maintained	d outside	the U.S.)
Fecific	5 A	ddress (number, street, and apt. or suite no.)	Reques	ter's name	e and add	ress (op	tional)		
See Sp	6 C	ity, state, and ZIP code							
	7 Li	ist account number(s) here (optional)							
Par	t I	Taxpayer Identification Number (TIN)							
Enter	vour	TIN in the appropriate box. The TIN provided must match the name given on line 1 to av	oid .	Social s	ecurity n	umber			
backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a</i>									
TIN or	n pag	ge 3.		or					
Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for Employer identification number									
guidel	ines	on whose number to enter.			-				
Part	t II	Certification							
Under	pena	alties of perjury, I certify that:							
1. The	e nun	mber shown on this form is my correct taxpayer identification number (or I am waiting for	a numb	er to be	issued to	o me); a	and		
Ser	rvice	t subject to backup withholding because: (a) I am exempt from backup withholding, or (b. (IRS) that I am subject to backup withholding as a result of a failure to report all interest er subject to backup withholding; and							
3. I ar	nal	J.S. citizen or other U.S. person (defined below); and							
4. The	FAT	CA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting	ng is cor	rect.					
becau interes genera instruc	se your st paid ally, postions	on instructions. You must cross out item 2 above if you have been notified by the IRS the but have failed to report all interest and dividends on your tax return. For real estate transicily, acquisition or abandonment of secured property, cancellation of debt, contributions to payments other than interest and dividends, you are not required to sign the certifications on page 3.	actions, o an ind	item 2 d	oes not a	apply. Farrang	or moi ement	rtgage (IRA),	and
Sign Here		Signature of U.S. person ▶ Da	ate ►						

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

- 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
 - 2. Certify that you are not subject to backup withholding, or
- 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.



Agent Contract Guarantee Agreement Form

Levinson & Associates, inc. has agreed to guarantee the oiligation(s) of the undersigned to repay leans, advances of commissions and/ or everpayment of commissions made by various insurance companies to the undersigned. In the event at any time in the future Levinson & Associates, inc. pays any of the oforesald chiligations; the undersigned agrees to reiniburse Levinson & Associates, inc. for the sums paid by Levinson & Associates, inc. and (urther agrees that Levinson & Associates, inc. shall have the right and its hereby euthorized to charge any credit cards identified below as a non-exclusive method of receiving payment for sold sums. The undersigned acknowledges that rold sums may be charged at any time after Levinson & Associates, inc. pays the obligation and acknowledges that payment by Levinson & Associates', inc. may not be mode for several years after the obligation is incurred by the undersigned. The undersigned thereby waives any statute of limitations with regard to sums owed by the undersigned to Levinson & Associates, inc. and agrees that, in the event of nonpayment by the undersigned, Levinson & Associates, line, may report sold obligation as unpaid to any credit bureau or reporting agency.

The undersigned agrees to immediately notify Levinson & Associates, inc in the event that any of the credit cards listed below are revoked, surrendered, termineted or credit is no longer available undersald card. The undersigned further agrees to provide all updated information, including any replacement or expiration of said card, in the event that the undersigned contests any charge and the charge is deemed valid, the undersigned shell reimburse Levinson & Associates, inc. for all casts and fees, including alternays' fees, associated with such contest.

Because this authorization relates to an on-going guarantes of commercial obligations, the undorsigned agrees that this authorization shall be browgeable.

Data	Signature
	Printed Name
however, that I am required to roimburse Levis	AID Ploate initial one of the followings t, and therefore am not providing credit card information below. I understand the son & Associates, inc. for any sums paid as guarantee for obligations as detail the providing two (2) credit card numbers below.
Card number: Namo on Card:Namo on Card:	giCard Socurity Codo:
Pago 2 of 2 Dilling Address:	
Cardholder Signature:	,
Oard Two (Required) VISA Mester Card number: Expiration Dator Name on Cardi Billing Addross:	Security Code:
Cardholder Signatures	•