

**Phone:** (800) 918-8877  
**Fax:** (847) 615-4943  
**Email:** CustomerCare@trustmarkbenefits.com  
**Website:** TrustmarkVB.com  
PO Box 7937  
Lake Forest IL 60045-7937



### **FULL SURRENDER**

Please print or type except where signatures are requested.

Policy Number: \_\_\_\_\_

Insured's Name: \_\_\_\_\_

Owner's Address (including City, State, Zip Code): \_\_\_\_\_

Owner's Phone Number: (\_\_\_\_\_) \_\_\_\_\_

### **CANCELLATION OVERVIEW**

Did you know that with a partial surrender you can get cash out of your policy without canceling your policy? To check if you are eligible for a partial surrender, contact Trustmark Customer Care at **(800) 918-8877** or **CustomerCare@trustmarkbenefits.com**.

#### **If you would like to do a full surrender of your coverage, please complete the following:**

I request the full cash surrender of my policy, minus any amount owed on an outstanding loan.  YES  NO

I understand that cash surrender of my policy may result in early termination fees.  YES  NO

I understand that a full cash surrender **cancels my policy**. I have 30 days to change my mind and reinstate my policy by returning any funds issued to me based on the surrender request.  YES  NO

I (we) request that the transaction marked above be completed by Trustmark and I (we) expressly warrant that all persons signing below are of legal age. The changes requested in the form will not become effective until approved by Trustmark. Please allow seven to ten business days for processing your request.

Dated at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_  
City and State

Name of Owner(s): \_\_\_\_\_

Signature of Owner(s): \_\_\_\_\_

### **REASON FOR SURRENDER**

- Premiums are no longer affordable
- I need to replace lost income
- Funds are wanted to improve retirement lifestyle
- Have a new policy with a new employer

### **IMPORTANT TAX INFORMATION**

Substitute W-9 Information for Owner:

Have you been notified by the Internal Revenue Service that you are subject to back-up withholding?  YES  NO

Do you want Trustmark to withhold 20% of your taxable interest income?  YES  NO