



IRA/ROTH IRA Summary

National Guardian Life Insurance Company • P.O. Box 2867 • Clinton, IA 52733-2867
Phone 877.442.6960 • Fax 608.373.7384 • www.nglic.com

(MUST BE COMPLETED and submitted with each IRA/Roth IRA Application)

The proposed annuitant, indicated below, has applied for a National Guardian Life Insurance Annuity Contract. To ensure that the correct tax qualification is applied to the annuity contract, the following information is required for all tax-qualified applications.

SECTION A: Tax Qualification

The annuity applied for is (please check only one choice):

- Traditional IRA (Individual Retirement Account)
- Roth IRA

Roth IRA Inception Date:

SECTION B: Source of Premium

- Current Year Contribution
- Transfer From Another Company
- Rollover
- Catch-Up Contribution (For previous year)
(For contributions made January - April 15)

SECTION C: Attestation

The above statements are true to the best of my knowledge, information and belief.

Printed Name of
Owner/Annuitant:

Signature of
Owner/Annuitant:

Date: