



Oceanview Life and Annuity Company
 Oceanview Life and Annuity Insurance Company
 PO Box 830 Grimes, IA 50111-0830
 Tel 888.295.3815 • Fax 888.417.3702 • www.oceanviewlife.com

Trusted Contact Authorization Form

Owner Name: _____ Owner SSN or Tax ID: _____
 Contract Number(s): _____ Account Type: _____ MYGA _____ FIA

1. Authorization

I hereby authorize Oceanview Life and Annuity Company to contact the below listed Trusted Contact Person in the event Oceanview has a reasonable belief that I am (1) the victim of financial exploitation or other abuse or (2) experiencing health issues that may impair my ability to make financial decisions on the above referenced accounts. Oceanview may disclose information about my account(s) to the Trusted Contact Person in order to confirm my contact information, health status and the identity of any legal guardian, executor, trustee, or holder of a power of attorney, and as otherwise permitted by FINRA Rule 2165.

This form does not authorize the designated Trusted Contact Person to act on my behalf regarding the above referenced account(s).

2. Designated Trust Contact Person

Trusted Contact Person must be age 18 and older. When choosing a trusted contact person, you may want to consider an unrelated party such as an attorney or CPA. Your financial advisor cannot be named as a trusted contact. We suggest that you inform your trusted contact of their role.

Name of Trust Contact Person: _____
 Relationship: _____
 Street Address: _____ City: _____ State: _____ Zip: _____
 Daytime Phone Number: _____ Evening Phone Number: _____
 Email Address: _____

3. Signature/Representations

I understand that Oceanview Life and Annuity Company is not required to contact any designated Trusted Contact Person (but may do so in its sole discretion) and agree to hold Oceanview harmless if for any reason it does or does not reach out to a Trusted Contact Person regarding my account(s).

This Authorization is optional and may be withdrawn at any time by notifying Oceanview in writing.

 Owner's Signature Printed Name Date

 Joint Owner's Signature Printed Name Date