

Required Documents

Metropolitan Tower Life Insurance Co.

	Assigned	Unassigned Buy & Hold	Periodic Payment Agreement	Non- Qualified Assignment
Locked in Quote	✓	✓	✓	✓
Commission Sharing Agreement	If Applicable	If Applicable	If Applicable	If Applicable
Completed Application / Data Transmittal Form	✓	✓	✓	✓
Settlement Agreement and Release "SAR"	✓	✓	✓*	✓
Additional Language in SAR	Death Commutation Proof of Living	Endorsements Proof of Living	Endorsements Proof of Living	Death Commutations
Executed Qualified Assignment (QA, QAR or QARP)	✓	NA	NA	NA
Executed PPA or PPAR	NA	NA	✓	NA
Executed NQAR	NA	NA	NA	✓
Proof of Birth (Life Contingent Benefits)	✓	✓	✓	✓
Court Approval	If Applicable	If Applicable	If Applicable	If Applicable
Guardianship Conservatorship Trust	If Applicable	If Applicable	If Applicable	If Applicable
Hold Harmless	Attorney Fees	NA	Attorney Fees	Attorney Fees
W-9 Form	Attorney Fees	Taxable	Attorney Fees	✓ (Incl. Atty Fees)
W-4P Form	NA	Taxable	Taxable (Incl. Atty Fees)	✓ (Incl. Atty Fees)

* Not Required on Transfer/Replacement of Benefit cases

Please Note: Depending on the type of product and the state the case is domiciled more or less documentation may be required.