



NASSAU

Nassau Life and Annuity Company
Nassau Life Insurance Company
PHL Variable Insurance Company
Nassau Life and Annuity Insurance Company

IRA Qualified Charitable Distribution
Internal Revenue Code Section 408(d)(8)
Letter of Instruction - Addendum

In order to process a request for a Qualified Charitable Distribution, as defined in Internal Revenue Code section 408(d)(8), the following additional information is needed:

Name of Qualified Charitable Organization: _____

Address of Qualified Charitable Organization: _____

EIN of Qualified Charitable Organization: _____

Frequency: ☐ One-time Partial
Provide total amount requested: \$ _____
Special Instructions: _____

- ☐ Annual Charitable Distribution
- This will be ongoing until stop requested
 - For full RMD amount only

I request that Nassau Life and Annuity Company, Nassau Life Insurance Company, PHL Variable Insurance Company, or Nassau Life and Annuity Insurance Company ("the Company") process a request for a Qualified Charitable Distribution to the above Qualified Charitable Organization in the amount specified above. In this request, I understand:

- No employee or agent of the Company has provided any tax or legal advice or guidance to me concerning the application of any provision in the Internal Revenue Code, including the specific provisions relating to a Qualified Charitable Distribution;
- A Qualified Charitable Distribution is reported as a distribution to me on IRS form 1099-R, as required by current IRS requirements;
- In addition to this Addendum, other Company's forms may be required.

Name of Account Owner

Account Number

Signature

Date