



# ANNUITY APPLICATION FOR NEW MEMBERS

**Knights of Columbus, A Fraternal Benefit Society, 1 Columbus Plaza, New Haven, CT 06510-3326**

**INFORMATION CONCERNING APPLICANT**

1. Name of Applicant (last-first-middle initial) \_\_\_\_\_

**INFORMATION CONCERNING ANNUITANT**

2. Name (last-first-middle initial) \_\_\_\_\_ Sex \_\_\_\_\_

3. Street \_\_\_\_\_

4. City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip Code/Postal Code \_\_\_\_\_

5. Relationship to Applicant \_\_\_\_\_ Age \_\_\_\_\_

6. Social Security Number/Social Insurance Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

7. Amount Paid With Application: (must be at least \$100.00).  
\$ \_\_\_\_\_

8. Will this annuity replace, in whole or in part, any existing insurance or annuity now in force? Yes  No

If yes, provide the following information regarding the contract to be replaced.

Company	Year Issued	Amount

**INFORMATION CONCERNING BENEFICIARY**

9. Name \_\_\_\_\_ Relationship to Annuitant \_\_\_\_\_

10. Social Security Number/Social Insurance Number \_\_\_\_\_ Date of Birth \_\_\_\_\_

**REGARDING MY APPLICATION FOR A KNIGHTS OF COLUMBUS ANNUITY CONTRACT, I UNDERSTAND:**

1. The long range nature of the annuity being purchased.
2. While the Board of Directors will always strive to maintain competitive interest rates, any interest rates not specifically guaranteed at the time of issue of this contract are subject to change from time to time at the discretion of the Board of Directors.
3. A surrender charge ranging from 5% to 2% will be imposed on amounts withdrawn from this annuity contract within seven years of deposit, with no surrender charge being made against amounts on deposit over seven years. After the first contract year, if the Accumulation Value is \$5,000 or more, I may withdraw as much as 10% of it once each year with no surrender charge. If a surrender charge is applicable, it will be imposed regardless of my age at the time of withdrawal.
4. (a) In the United States: Interest credited to this contract is taxable when proceeds are withdrawn, and a 10% penalty is imposed by the IRS on taxable income withdrawn before the taxpayer is age 59 ½. (This Internal Revenue Service penalty will not be assessed if the taxable income is disbursed in periodic payments made for the life of the taxpayer.)  
(b) In Canada: Interest credited to this contract is reportable on an annual basis, even if there is no distribution.
5. The annuity applied for will be cancelled if the applicant is a candidate for membership and has not been initiated into the First Degree of the Order within 90 days of the date of this application.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

## WHY YOU SHOULD BE A KNIGHT OF COLUMBUS

1. As an integral part of the world's largest and most dynamic Catholic fraternal organization, you will be united with more than 1.7 million brother Knights and their families in over 13,000 local councils in the United States, Canada, Mexico, the Philippines, Poland, Central America and the Caribbean.
2. Your personal involvement as a Knight will provide opportunities, in charity and fraternity, for service to the Church at the local, diocesan and universal levels; to your communities; and to the less fortunate in our midst.
3. Your active participation in council affairs: spiritual, fraternal, family, social, civic-oriented, athletic and recreational – will serve as a school of leadership and enable you to develop qualities that enhance your strengths and abilities.
4. You will enjoy a sense of “belonging” in an organization that shares your religious beliefs, brings together like-minded men joined in a common cause, and offers the opportunity to develop and cement friendships for years to come.
5. Your concerns for your family and for your retirement years can be addressed by the Order's low-cost insurance program, conducted by brother Knights for brother Knights, and assure **their** security and **your** peace of mind.
6. You will share in the sense of pride all Knights feel in knowing that their Order is second to none in support of our Holy Father, our bishops and priests; in working for our fellow man, especially those most in need; and in binding together to preserve traditional values in the face of attacks against the family and innocent human life.

## WHY YOU AND YOUR WIFE SHOULD ACCEPT THIS “NEW MEMBER ANNUITY” OFFER

1. For as little as \$100 each, you and your wife can open an annuity.
2. Your principal is guaranteed by the Knights of Columbus.
3. The Board of Directors sets the interest rate for this plan, but at no time will it drop below 3%. All interest credited in the United States is tax deferred.
4. You may add deposits to your annuity at any time.
5. Everybody can use additional funds during their retirement.