



AUTHORIZATION TO DISCLOSE ANNUITY ACCOUNT INFORMATION

Frequently Asked Questions

1 Q: What is the purpose of form A014 (Authorization to Disclose Annuity Account Information)?

A: This form provides us with information necessary to help validate your identity when you call. We will use the secret control question that you designate in Section 3 as one of the measures used to help validate that the person we are speaking to on the phone is you. Additionally, your secret control question will be used as one of the methods to validate your online identity during your future web based account setup when this feature becomes available from PRCUA.

2 Q: Do I need to complete this form?

A: YES. PRCUA is proactive in protecting your privacy. This form is a necessary part in properly controlling the release of information to you or other third-party individuals that you may designate as authorized to help you in administering your account.

3 Q: What if I refuse to complete this form?

A: The information that you provide on form A014 will help us validate that it is you on the other end of the phone or it will allow us to provide information about your account to any third-party individuals that you have designated in Section 4. Without this form, we may not be able to release any information to the caller if we cannot properly validate the identity of the caller.

Your annuity application will still be processed. However, any release of information for this account may be limited to the form of mailings to your current postal address on file with no account disclosure to any individuals except yourself.

4 Q: What is required to be completed on this form?

A: All requested fields of information in Sections 1 and 2 must be completed, with the exception of the certificate number for new applications. In Section 3, you must also select one of the predefined secret control questions and provide the answer in the boxes following the question, or you may write your own custom secret control question and provide its answer. Finally you must sign and date the form in Section 5. The completed form should be sealed in the provided envelope and mailed to:

**Annuity Processing
Polish Roman Catholic Union of America
984 N Milwaukee Ave
Chicago, IL 60642-4101**

For new annuity applications, simply complete the form, enclose and seal it in the provided return envelope, and present it to your sales representative. They will properly forward it with your new annuity application for processing.

QUESTIONS?

Contact us at

1-800-772-8632

Monday - Friday
8:15am - 4:00pm (CST)

- or -

Visit us on the
Internet at

www.prcua.org



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Frequently Asked Questions

...continued

- 5 Q:** *Why do I have to provide a secret control question?*
- A:** When you call us regarding your annuity account, we will ask you the secret control question that you specified in Section 3 and anticipate the response to the question to match your specified answer. This is one of the methods we will use for protecting the release of your annuity information with phone calls.
- 6 Q:** *What is Section 4 used for and why would I want to authorize any third-party individual with access to my account information?*
- A:** Section 4 allows you to specify which individuals you authorize us to release information to regarding your account or transaction history. You may want your spouse, a family member, or financial advisor to be included on this list of authorized individuals if you want them to help you with the administration of your account. Additionally, you can allow your PRCUA sales representative (deputy/agent) to have access to your account information and transaction history so he/she can effectively help you with protecting your financial future through the use of PRCUA's financial products and services.
- 7 Q:** *If I authorize the release of my account information to third-party individuals, can they make changes or withdraw any money from my account?*
- A:** Third-party individuals to whom you have authorized the release of account information to will ONLY be able to receive account information. Any changes to the account and distribution of funds will still require your written approval with the required PRCUA Annuity form.
- 8 Q:** *Can I change my secret control question or the third-party individuals that I have made or is my selection permanent?*
- A:** You may change your secret control question and answer or authorized third-party individuals at any time. Simply submit another A014 form with your new information. If you want to remove previously authorized third-party individuals, simply do not include them on the new A014 form. Upon receipt of your newly completed A014 form at the PRCUA home office, any previous secret control question and answer and authorized third-party individuals on file for your annuity record will be removed and the new A014 form's secret control question and answer and authorized third-party individuals will become effective.

3. SECRET CONTROL QUESTION Required

To help PRCUA employees with validating your identity when you call us, we will ask you your selected secret control question and anticipate the answer you provide in the boxes following the selected secret control question. You may select one of the predefined questions or you may enter your own custom question in order to provide a higher level of security. Please select only ONE secret control question.

What city were you born in? [Grid]

When is your wedding anniversary? [Grid] (MONTH/DAY/YEAR)

What is your favorite sports team? [Grid]

What is your favorite color? [Grid]

I want to enter my own custom secret control question:

[Grid] (ENTER YOUR OWN SECRET QUESTION)

[Grid] (ENTER YOUR OWN SECRET ANSWER)

[Grid] (ENTER YOUR OWN SECRET ANSWER)

PLEASE PRINT IN THE BLOCKS WITH CAPITAL LETTERS

4. AUTHORIZED THIRD-PARTY INDIVIDUALS Optional

You can specify third-party individuals, such as a family member, spouse or personal financial advisor, who are authorized to receive information about your account and the transaction relating to your account. Please print the names as {FIRST NAME}{blank}{MIDDLE NAME}{blank}{LAST NAME}.

NAME OF AUTHORIZED INDIVIDUAL(S)

1: [Grid]

2: [Grid]

3: [Grid]

4: [Grid]

You can also authorize your current PRCUA sales representative (deputy/agent). Allowing your current PRCUA sales representative (deputy/agent) with access to your account information and transaction history will provide them with information necessary to effectively provide you with future assistance.

PRCUA sales representatives are bound by the terms of the PRCUA Privacy Policy and are authorized to use your account information only for servicing your financial protection with the use of PRCUA offered financial products/services.

I authorize the PRCUA sales representative below to have access to my annuity account information:

[Grid]

PRCUA SALES REPRESENTATIVE (DEPUTY/AGENT) NAME

5. SIGNATURE Required

SIGNATURE OF OWNER

SIGNATURE DATE