

CONSUMER REFUSAL TO PROVIDE INFORMATION

Do Not Sign Unless You Have Read and Understand the Information in this Form

Why are You being given this form?

You are buying a financial product – an annuity.

To recommend a product that effectively meets Your needs, objectives and situation, the agent, broker, or company needs information about You, Your financial situation, insurance needs and financial objectives.

If You sign this form, it means You have not given the agent, broker, or company some or all the information needed to decide if the annuity effectively meets Your needs, objectives and situation. You may lose protections under the Insurance Code of Oregon (Chapter 143, 2023 Laws, Section 2(17)) if You sign this form or provide inaccurate information.

What duty of care do I owe You, the customer?

- I have provided You with a written list of the specific information that You did not give the agent, broker, or company that is necessary to decide if the annuity effectively meets Your financial situation, insurance needs, and financial objectives.

Statement of Purchaser:

- I **REFUSE** to provide this information at this time.
- I have chosen to provide LIMITED information at this time.

Customer Signature

Date

Agent/Producer Signature

Date