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## Non-Resident Information Form

Generally, insurance products should not be solicited outside the state where the owner resides. However, in some cases it may be permissible for an owner to complete and sign an application in other states. Such transactions may be proper when the owner has a significant connection to the non-resident state, or in the case of one or more of the following:

- The owner/applicant owns or rents a secondary address in the non-resident state.
- The owner/applicant is employed by or owns a business in the non-resident state.
- The owner/applicant of the policy/contract will be a trust or LLC domiciled in the non-resident state.
- The owner/applicant is different than the insured/annuitant and the sale took place in the resident state of the insured/annuitant.
- The owner/applicant has a prior relationship with the producer and the sale took place in the producer’s primary office location.
- The owner/applicant was referred to the producer and the sale took place in the producer’s primary office location.

Some states prohibit non-resident sales to their residents. It is our interpretation that the insurance regulations of **Arkansas, Massachusetts, Minnesota, Mississippi, Utah, New York, Washington** and **Wisconsin** do not permit sales of insurance products to residents outside of their state of residence, regardless of the circumstances or the connection to the non-resident state.<sup>1</sup> If a non-resident application is submitted for a resident of one of these states, it will be declined.

<sup>1</sup> Arkansas residents may purchase an annuity in Mississippi or Tennessee. Mississippi residents may purchase an annuity in Arkansas or Tennessee. Producers must have a non-resident license in the applicant’s state of residence.

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### Instructions

This form is required to be completed whenever an owner applies for an annuity product outside of his or her state of residence (other than the states listed above). You must describe the connection between the owner/applicant and the non-resident state in which the sale took place. You may be asked to provide evidence that the owner/applicant was in the non-resident state for reasons other than to transact insurance at the time of solicitation.

NOTE: This form is not an application form and does not become a part of the contract. **The issued annuity contract must be delivered in the same state in which the application was solicited. It may not be mailed to the customer’s home address.** Mountain Life Insurance Company products are only available to residents of the United States of America.

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### 1. Owner Information

_____ Name of owner/applicant	_____ Application date
_____ Annuity product	_____ Amount of annuity premium
_____ State of residence	_____ State of solicitation

