

# My payment preferences

Save time and paper.

Manage your account online at [newyorklife.com](http://newyorklife.com).

## STEP 1 Tell us your contact information.

Policy owner name - Individual/Trust/Corporation

FIRST M.I. LAST

Daytime phone

Email

Address  Check this box to update our records with new address information.

STREET

APT.

CITY

STATE

ZIP

## STEP 2 Payment Authorization

### One-Time payment – Complete all steps below except Step 4.

Authorize a one-time electronic funds transfer (EFT) for initial payment, catch up premiums or a renewal payment amount for one time draft.

### Recurring payments

Payments drawn monthly

### For New York Life Guaranteed Future Income Annuity or New York Life Future Mutual Income Annuity ONLY

Payments to be drawn:  Monthly  Quarterly  Semi-annually  Annually

## STEP 3 Tell us your policy number(s) and premium draft amount(s). For additional policies, please list on bottom of page 2.

Policy numbers	Premium amount	Option to purchase paid-up additions-OPP (\$10 minimum, \$5 for Employee Whole Life)	Add to existing multiple arrangement Case Ref #
<input type="text"/>	\$	\$	
<input type="text"/>	\$	\$	
<input type="text"/>	\$	\$	
<input type="text"/>	\$	\$	

## STEP 4 Select your draft date (recurring payments only).

### For Whole Life, Term, and Universal Life insurance policies:

Withdraw premiums for each policy as individual transactions each month on the policy due date.

Withdraw premiums for all policies in a single transaction on the 15<sup>TH</sup> of each month.

### For Variable Universal Life insurance policies and all Annuity policies:

Withdraw premiums for each policy as individual transactions each month on the policy due date.

Select a draft date to withdraw all premiums as individual transactions.

(cannot be scheduled for the 29th, 30th, or 31st of month).

Draft date:                      Please indicate day of the month

### For New York Life Guaranteed Future Income Annuity/New York Life Future Mutual Income Annuity policies ONLY:

Indicate automatic payment end date (cannot be scheduled for the 29th, 30th, or 31st of month)

MM/DD/YYYY

## STEP 5A Tell us what bank account you'd like to use (must be a U.S. bank account).

Routing number

Bank name

City, State of branch

Account number   Checking  Savings

Name of account holder

Name                      1234  
Address                       
City, State, Zip                      Date                      01-2345678

PAY TO THE ORDER OF                      \$  DOLLARS

BANK NAME                       
ADDRESS                       
CITY, STATE, ZIP                     

FOR                     

⑆ 123456789 ⑆ 000123456789 1234

Bank Routing Number      Account Number      Check Number



Your signature is required on the next page ▶

