

# Telephone Authorization Form

Use to authorize a third party to perform the following activities by telephone:

- Obtain policy information (for all life insurance and annuity policies)
- Change the allocation of future payments (for Variable life & Variable annuity only)
- Transfer funds among investment division and/or Fixed Account (for Variable life & Variable annuity only)
- Only one third party can be added per policy

**Questions?** Call us at:

**For Life Insurance & Fixed Annuities**  
**(800) 695-9873** 8 am - 7 pm ET

**For Variable Life & Variable Annuities**  
**(800) 598-2019** 9 am - 6 pm ET

For online access and policy info, visit us at [www.newyorklife.com](http://www.newyorklife.com)

**Send completed,  
signed form to:**

New York Life  
 PO Box 130539  
 Dallas, TX 75313-0539

## Policy Number(s)

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## Policy Owner Information

Policy Owner Name (First, M.I., Last)	Daytime Phone	Email
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Address				
STREET	APT.	CITY	STATE	ZIP

If applicable: Policy Owner 2 Name (First, M.I., Last)	Daytime Phone	Email
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Address				
STREET	APT.	CITY	STATE	ZIP

## Individual to be Granted Authorization

**PLEASE NOTE: A Registered Representative/Agent of New York Life (current and former) may not be named as an authorized third party. In addition, New York Life reserves the right to decline any Telephone Authorization request in its discretion.**

Name (First, M.I., Last)	Date of Birth MONTH / DAY / YEAR
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Address				
STREET	APT.	CITY	STATE	ZIP

Relationship to Policy Owner	Social Security Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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## Terms: By signing, you agree to the following terms:

- This authorization form must be complete and accurate in order for the authorization to be accepted.
- For Variable Annuities and Variable Life policies, telephone requests must be received at the Variable Products Service Center no later than 4:00 p.m. Eastern Time in order to assure same day processing of the transaction. Telephone requests received after this time will be treated as if they were received the next business day.
- All telephone requests will be recorded for your protection.
- Telephone privileges may be discontinued at any time.
- A change in policy ownership cancels any third party authorization.
- New York Life Insurance and Annuity Corporation and/or the Variable Products Service Center are not liable for any loss, cost or expense for acting on telephone instructions which are believed to be genuine in accordance with the procedures described in the prospectus. Liability for erroneous transfers/allocation changes, unless clearly contrary to instructions received and brought to NYLIAC's attention within 15 days of receiving a confirmation statement of the transaction, will be limited to correction of the erroneous transaction on a current basis.

## Authorization & Signature(s)

I authorize New York Life to act upon telephone instructions, providing that certain identifying information (policy number, name, Social Security Number, address of record and date of birth) is given 1) to request policy information, and for Variable Life and Variable Annuity policies, 2) to transfer amounts among Investment Divisions and the Fixed Account of the above contract and 3) to change the allocation for future payments. I understand that New York Life must be given the prescribed identifying information whenever telephone instructions are made. I acknowledge that I have read the terms above and those specified in my policy, and I agree to them.

"New York Life" can refer either separately to the parent company, New York Life Insurance Company, or one of its subsidiaries, or collectively to all New York Life companies, which include New York Life Insurance and Annuity Corporation and NYLIFE Insurance Company of Arizona.

<input checked="" type="checkbox"/> Policy Owner Signature (Required)	Name (Print)	Date
<input checked="" type="checkbox"/> Policy Owner Signature (if applicable)	Name (Print)	Date

Variable products are distributed by NYLIFE Distributors LLC, Member FINRA/SIPC and offered through properly licensed Registered Representatives.

