APPLICATION INSTRUCTIONS

FOREVER FUND

BEFORE YOU APPLY

Explore our Product page (https://canvasannuity.com/#/product) and choose the Canvas Annuity option that is best for you, the Forever Fund or the Future Fund.

- The Future Fund offers the highest rates and can help you save for retirement. Choose from 3-, 5-, or 7-year guarantee periods.
- The Forever Fund provides guaranteed, predictable income starting immediately, with several payout options to choose from to meet your needs.

You can purchase a Canvas annuity if you have a business or resident address in one of our licensed states. To find a list of states where Canvas products are currently available, go to our homepage and select the drop-down under "I live in the state of". If you don't see your state, don't worry! We are working hard to make Canvas products available to you soon.

Still have questions? Head over to our Learn page to find more answers: https://canvasannuity.com/#/learn or reach out to our Canvas team: https://canvasannuity.com/#/ meet-our-reps

APPLY

APPLY WITH FAST APP PAGES 2-3

The Fast App can be completed in less than 10 minutes. Select this option if you are funding your annuity from a checking or savings account using an automated clearing house (ACH), Paper Check, or Wire Transfer. The quickest way to fund your account is by ACH from your checking account. Funds must be available in your bank account today; there are no fees for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction.

Before you get started, have your SSN, bank routing, and account numbers ready.

APPLY WITH APPLICANT PORTAL- PAGES 4-7

The Applicant Portal offers an agent-assisted application process. Select this option if you are planning to fund with an existing annuity or life policy, IRA, 401k or similar account. Also, choose this option to purchase for non-natural owners such as Trusts, Corporations, Charities, inherited annuities, or any other unique purchasing scenario.

For rollovers or transfers, you will need to have your existing account information on hand.

FOREVER FUND

APPLYING WITH FAST APP

START YOUR APPLICATION

Enter your name and email address. We value our clients and will never spam your inbox! Select the state where you have a business or resident address.

QUOTE

Select a payment option and enter the premium amount you would like to use to fund your annuity. The minimum for the Forever Fund is $10,000.

The final payment amount may differ from the estimate you received in the quoting tool. Factors like the date funds are received, your exact issue date, or age at issue may affect the final payment amount. You'll receive the finalized payment amount when your policy is issued, and you will have 30 days to review your policy.

NEEDS REVIEW

Purchasing an annuity should support your insurance needs and help you meet your financial goals. This process is designed to help you decide whether a Canvas annuity is the right fit for you.

OWNER INFORMATION

Canvas products are currently only available to U.S. Citizens or Resident Aliens, so we need your Social Security number or green card number. Once you submit your information, we have partnered with Lexis Nexis to verify your identity. This helps protect us both from fraud.

Simply answer the questions that pop up to continue your application.

ANNUITANT

The owner can name any natural person (not an entity) as the Annuitant, whose life determines the annuity payments. The Annuitant cannot be changed after the policy is issued. If you select someone other than yourself, you'll need their full name, address, email, phone number, date of birth, and SSN or green card number.

For non-qualified funds: Annuitant must be 18–80 for Single Life or Joint & Survivor, and 18–100 for Term Certain (based on the youngest for joint annuitant).

BENEFICIARY

The beneficiary will receive the remaining annuity payments if you choose a term certain option and the annuitant passes away before the term ends. If you choose a life-only option, payments will end once the annuitant passes away.

- You may list up to five beneficiaries—be sure to include as much info as possible (name, DOB, contact details, SSN or green card), and assign percentages totaling 100%.

FOREVER FUND

APPLYING WITH FAST APP

FUND YOUR POLICY

Please note that policies are typically issued within 1-2 business days once your funds are received.

AUTOMATED CLEARING HOUSE (ACH)

Fund your account quickly and securely. There are no fees and checking accounts are preferred for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction. Please make sure you have funds available in your bank account today to complete the transaction. ACH payments are typically received by the insurance company within 3 business days.

PAPER CHECK

You can mail in a check to our processing center. Include your application ID on your check. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application.

- The mailing address for check payments is:
  - Puritan Life Insurance Company of America
    PO Box 11823 Winston-Salem, NC 27116.
- For an overnight/expedited check, the physical address is:
  - Puritan Life Insurance Company of America
    4964 University Parkway, Ste. 203 Winston-Salem, NC 27106.

WIRE TRANSFER

You can wire funds directly to our processing center. Include your application ID in the reference section. Applications will remain open for 30 days after signature. If a check is not received in that time frame you will need to complete a new application. Wire transfers sent by 4:30 CT are typically processed the same day.

Wire Instructions:

- Recipient Name: Puritan Life Insurance Company of America
- Recipient Bank and Address: Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
- Domestic Wire Routing Transit Number (RTN/ABA): 121000248
- Account Number: 4122249618
- CHIPS Participant: 0407
- Puritan's Home Office Address: 7272 E. Indian School Rd. Suite 100, Scottsdale, AZ 85251

REVIEW & SIGN

You will be routed to DocuSign, where you can sign your application digitally; this is a simple and secure process. If you have any questions while you're signing, please call (888) 970-3556, and one of our licensed, non-commissioned agents can help you. Double-check that all your information is correct, sign, and click "Finish".

FOREVER FUND

APPLYING WITH APPLICANT PORTAL

START YOUR APPLICATION

For an entity-owned annuity, or funds from an IRA, 401 (k), or similar account, you will need to register for access to our applicant portal. You will be assisted by our licensed agents throughout the process. If you have any questions, you can chat with us or call us at (888) 970-3556.

If you already have an account, you can simply log in to access your account and start a new application.

OWNER INFORMATION

Choose who the owner of the new Canvas policy will be (self-owned, entity owned, or inherited) and if there is a joint owner.

ANNUITANT

The Owner can name any natural person (not an entity) as the Annuitant, whose life determines the annuity payments. The Annuitant cannot be changed after the policy is issued. If you select someone other than yourself, you'll need their full name, address, email, phone number, date of birth, and SSN or green card number.

For non-qualified funds, the annuitant must be 18–80 for Single Life or Joint & Survivor, and 18–100 for Term Certain (based on the youngest age for joint).
For qualified funds: Annuitant must be 59½–80 for Single Life or Joint & Survivor, and 59½–100 for Term Certain.

QUOTE

Select a payment option and enter the premium amount you would like to use to fund your annuity. The minimum for the Forever Fund is $10,000.

The final payment amount may differ from the estimate you received in the quoting tool. Factors like the date funds are received, your exact issue date, or age at issue may affect the final payment amount. You'll receive the finalized payment amount when your policy is issued, and you will have 30 days to review your policy.

BENEFICIARY

The beneficiary will receive the remaining annuity payments if you choose a term certain option and the annuitant passes away before the term ends. If you choose a life-only option, payments will end once the annuitant passes away.

- When entering beneficiaries, be sure to include as much info as possible (name, DOB, contact details, SSN or green card), and assign percentages totaling 100%.

FOREVER FUND

APPLYING WITH APPLICANT PORTAL

FUND YOUR POLICY

Please note that policies are typically issued within 1-2 business days once your funds are received.

DIRECT ROLLOVER OR TRANSFER

Fund your account with an existing annuity or life policy, IRA, 401k or similar account. You will need to have your transferring account information on hand. You will be presented with a transfer form. This form must be completed for each source of funds resulting from a rollover or transfer. This amount does not need to be exact.

In certain scenarios, you may be allowed to add funds from a checking or savings account in addition to a direct rollover or transfer. If you have any questions about combining funds, please feel free to chat with us or call us at 888-970-3556.

AUTOMATED CLEARING HOUSE (ACH)

Fund your account quickly and securely. There are no fees, and checking accounts are preferred for ACH transactions. If you need to use a savings account, contact your bank to confirm your account is set up to accept this type of transaction. Please ensure that you have sufficient funds available in your bank account today to complete the transaction. ACH payments are typically received by the insurance company within 3 business days.

PAPER CHECK & WIRE TRANSFERS

Applications will remain open for 30 days after the signature date. If a check or wire is not received in that time frame, you will need to complete a new application.

Paper checks - You can mail in a check to our processing center. Include your application ID on your check.

- The mailing address for check payments is:
  - Puritan Life Insurance Company of America,
PO Box 11823, Winston-Salem, NC 27116.
- For an overnight/expedited check, the physical address is:
  - Puritan Life Insurance Company of America
4964 University Parkway, Ste. 203, Winston-Salem, NC 27106.

Wire Transfers - You can wire funds directly to our processing center. Include your application ID in the reference section. Wire transfers sent by 4:30 CT are typically processed the same day.

Wire Instructions:

- Recipient Name: Puritan Life Insurance Company of America
- Recipient Bank and Address: Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
- Domestic Wire Routing Transit Number (RTN/ABA): 121000248
- Account Number: 4122249618
- CHIPS Participant: 0407
- Puritan's Home Office Address: 7272 E. Indian School Rd. Suite 100, Scottsdale, AZ 85251

FOREVER FUND

APPLYING WITH APPLICANT PORTAL

AFTER FUNDING

COMPLETE TASKS

One of our agents will work with you to assign the remaining documents, allowing you to complete your application. This will be done completely online through our secure applicant portal.

FOREVER FUND - AFTER YOU APPLY

REGISTER YOUR ACCOUNT

Once you have finished your application, you will be invited to register for your customer portal account. This is where you can view your policy status and issue packet. If you decide not to register at this time, you will be given another opportunity to register once your policy is issued.

If you complete your application using our secure online Canvas application dashboard, you will still need to register for your customer portal account.

LEAVE US A REVIEW

We love to hear from you! https://www.trustpilot.com/review/ canvasannuity.com

ISSUE YOUR POLICY

Canvas will send your application to the insurance company for processing.

Once the insurance company receives the funds and approves your application, they will issue your policy, and you will be notified that your policy documents are available to be viewed on your customer portal account. This email is usually sent to you within 3-5 business days after you apply. If you haven't registered for an account, you can do so at this time. If your application is not approved, the insurance company will return your funds.

30-DAY FREE LOOK PERIOD

The email we send to you, letting you know that your policy documents are available, also begins your 30-day free look period.

WATCH YOUR PAYMENTS FLOW

You can log in to your Canvas Customer Portal anytime to view your Forever Fund and make updates to your account.

TALK TO US

If you have any questions while you are completing your application, just type in the chat box online, or give us a call at (888) 970-3556. We're here to help!

FOLLOW US

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