APPLICATION INSTRUCTIONS

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. Additionally, select 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.

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.

PRODUCT

If the Future Fund is best for your needs, choose the term, then enter the amount (premium) you would like to fund your annuity with.

The minimum for the Future Fund is $2,500.

NEEDS REVIEW

Purchasing an annuity should support your insurance needs and assist you in meeting 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

Most people name themselves as the annuitant; however, you may name someone else. You can change the annuitant any time prior to annuitizing your contract by calling customer service.

If you choose someone other than yourself, you will need to enter that person's full name, address, email address, phone number, birthday, and either their social security number or green card number.

BENEFICIARY

The beneficiary will receive the accumulation value of your annuity should you pass away while your contract is in force.

- Please name at least one beneficiary for your contract.
- You may designate up to five different beneficiaries during the application.
- Enter as much information as you have, including their full name, birthday, address, email, phone number, and social security number or green card.
- You must designate the percentage of ownership in order to move on with the application. If you only have one beneficiary, use 100%.

FUTURE 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 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

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 the signature date. 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 the signature date. 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) 970-970- 3556, and one of our licensed, non-commissioned agents can help you. Double-check that all your information is correct, sign, and click "Finish".

FUTURE 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.

PRODUCT

If the Future Fund is best for your needs, select the term, then enter the amount (premium) you would like to use to fund your annuity.

The minimum for the Future Fund is $2,500.

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

Most people name themselves as the annuitant; however, you may name someone else. You can change the annuitant any time prior to annuitizing your contract by calling customer service.

If you choose someone other than yourself, you will need to enter that person's full name, address, email address, phone number, birthday, and either their social security number or green card number.

BENEFICIARY

The beneficiary will receive the accumulation value of your annuity should you pass away while your contract is in force.

- Please name at least one beneficiary for your contract.
- You may designate up to five different beneficiaries during the application.
- Enter as much information as you have, including their full name, birthday, address, email, phone number, and social security number or green card.
- You must designate the percentage of ownership to move on with the application. If you only have one beneficiary, use 100%.

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

FUTURE FUND

APPLYING WITH APPLICANT PORTAL

AFTER FUNDING

COMPLETE TASKS

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

FUTURE FUND - AFTER YOU APPLY

REGISTER YOUR ACCOUNT

Once you have finished your application, you will be invited to register for your customer portal. This is where you can view your policy status and issue packet.

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 have not registered for an account, you will be able to 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 MONEY GROW

You can log in to your Canvas Customer Portal anytime to watch your Future Fund balance grow and to make changes to your account.

GET YOUR MONEY

At the end of whatever contract term you've chosen, you will have several options for what to do next. Most people choose to either renew their contract or take their money (principal + interest) back in a lump sum. You can also annuitize your contract, meaning you can choose to receive periodic payments for a specific period of time or for the rest of your life.

AND REMEMBER – 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!

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