



NASSAU RE

Nassau Life and Annuity Company (the Company)
Nassau Life Insurance Company (the Company)
PHL Variable Insurance Company (the Company)

**IRA Qualified Charitable Distribution
Internal Revenue Code Section 408(d)(8)
Letter of Instruction - Addendum**

In order to process a request for a Qualified Charitable Distribution, as defined in Internal Revenue Code section 408(d)(8), the following additional information is needed:

Name of Qualified Charitable Organization: _____

Address of Qualified Charitable Organization: _____

EIN of Qualified Charitable Organization: _____

Amount of Qualified Charitable Distribution: _____

I request that Nassau Life and Annuity Company, Nassau Life Insurance Company or PHL Variable Insurance Company ("the Company") process a request for a Qualified Charitable Distribution to the above Qualified Charitable Organization in the amount specified above. In this request, I understand:

- No employee or agent of the Company has provided any tax or legal advice or guidance to me concerning the application of any provision in the Internal Revenue Code, including the specific provisions relating to a Qualified Charitable Distribution;
- A Qualified Charitable Distribution is reported as a distribution to me on IRS form 1099-R, as required by current IRS requirements;
- In addition to this Addendum, other Company's forms may be required.

Name of Account Owner

Account Number

Signature

Date

We require a Signature Guarantee. A Medallion Signature Guarantee and the Signature Verification Program can be obtained at most banks. Originals must be submitted. Please keep a copy of this form for your records.

I CERTIFY that _____ whose identity is known or was proven to me, personally
Name of person(s) who appeared
appeared before me on the _____ day of _____ 20____.

(OFFICIAL STAMP OR SEAL)

ACCEPTABLE CERTIFICATIONS:
Medallion Signature Guarantee Stamp or Signature
Validation Program Stamp