



## Additional forms available

Is the form you need not on our website?

Click on the category below to find all John Hancock Annuities forms not available on our website.

You can also press Ctrl+F on your PC or ⌘ +F on your Mac to search for a key word.

### New York ONLY Forms

● Forms specific to residents of New York

### Financial Transaction Forms

● E.g., annuitization, deposits, investment changes, rider step-ups, transfers, withdrawals

### Maintenance Forms

● E.g., authorization, verification, rider election

### Special Request Forms

● E.g., conversions, divorce, nursing home requests

Additional forms may also be found on the following websites:

John Hancock Group Annuities

John Hancock Structured Settlements

IRS (Federal tax forms)

**Still can't find the form you need? [Click here](#) to email us a form request or call us at 1-800-344-1029 Monday through Friday, 8 a.m. – 6 p.m. Eastern Time.**



John Hancock Life Insurance Company (U.S.A.) ■ 197 Clarendon Street ■ Boston, MA 02116 ■ 1-800-344-1029 ■ [www.jhannuities.com](http://www.jhannuities.com)

John Hancock Annuities are issued by John Hancock Life Insurance Company (U.S.A.), Lansing, MI 48906, which is not licensed in New York. In New York, John Hancock Annuities are issued by John Hancock Life Insurance Company of New York, Valhalla, NY 10595. John Hancock Variable Annuities are distributed by **John Hancock Distributors LLC**, member FINRA.

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ADDFORMSFLY 2/18

**NY Insurance Department of the State of New York Definition of Replacement Form (70384)**

Make a comparison of your present policy or contract and the contemplated replacement if you are replacing or otherwise changing the status of an existing NY life insurance policy or annuity contract.

**NY JH Legacy Asset Rebalancing Program Enrollment Form (ANNSRNY)**

Enroll in the Asset Rebalancing Program for your NY JH Legacy variable annuity contract.

**NY JH Legacy Dollar Cost Averaging Program Enrollment Form (ANNDCCANY)**

Enroll in the Dollar Cost Averaging Program for your NY JH Legacy variable annuity contract.

**NY JH Legacy Investment Option Change Form (ANNIONY)**

Make investment option transfers on a one-time basis or change how future purchase payments will be allocated to your NY JH Legacy variable annuity contract.

**NY GIFL and GIFL Select Investment Option Change Form (GIFLIOCIFY)**

Make investment option transfers within your NY GIFL or NY GIFL Select variable annuity contract.

**NY Venture Opportunity Series Asset Rebalancing Enrollment Form (1307185NY)**

Enroll in the Asset Rebalancing Program for your NY Venture Opportunity variable annuity contract.

**NY Venture Opportunity Series Investment Option Change Form (1307218NY)**

Make investment option transfers on a one-time basis for your NY Venture Opportunity variable annuity contract.

**NY Venture Series Asset Rebalancing Program Enrollment Form (130718NY)**

Enroll in the Asset Rebalancing Program for your NY Venture Series variable annuity contract.

**NY Venture Series Dollar Cost Averaging Program Enrollment Form (130709NY)**

Enroll in the Dollar Cost Averaging Program for your NY Venture Series variable annuity contract.

**NY Wealthmark Series Asset Rebalancing Program Enrollment Form (150718NY)**

Enroll in the Asset Rebalancing Program for your NY Wealthmark Series variable annuity contract.

**NY Wealthmark Series Dollar Cost Averaging Program Enrollment Form (150709NY)**

Enroll in the Dollar Cost Averaging Program for your NY Wealthmark Series variable annuity contract.

**NY Wealthmark Series Investment Option Change Form (150721NY)**

Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your NY Wealthmark Series variable annuity contract.

**403(b) Loan Program ACH Authorization Form (80705)**

Pre-authorize electronic fund transfers from your bank account to repay a loan on your existing variable annuity contract.

**Accommodator Annuitization Form (1307244)**

Receive a variable income stream from an Accommodator variable annuity contract.

**AnnuityNote Series Annuitization Form (40703)**

Receive a guaranteed income stream from an AnnuityNote Series variable annuity contract.

**AnnuityNote Portfolio Series Annuitization Form (ANNANOTEPSFM)**

Receive a guaranteed income stream from an AnnuityNote Portfolio Series variable annuity contract.

**Automatic Investment Program Enrollment Form (130708)**

Enroll in the Automatic Investment Program and authorize automatic payments from your bank account.

**Federal Tax Withholding Election Form (1307130)**

Change your federal tax withholding election on your annuity contract.

**GIFL and GIFL Select Investment Option Change Form (GIFLIOCF)**

Make investment option transfers within your GIFL or GIFL Select variable annuity contract.  
 NY residents [click here](#).

**GRIB Rider Annuitization Form (1307202)**

Receive a guaranteed lifetime income stream from a JH Legacy annuity contract with the Guaranteed Retirement Income Benefit (GRIB) rider.

**GRIP Rider Annual Step-Up Election Form (1307166)**

Request to step-up the Income Base associated with your Guaranteed Retirement Income Program (GRIP) rider to match your contract anniversary value.

**Inherited/Beneficiary Account Required Minimum Distribution Request Form (1307195)**

Request that John Hancock make a withdrawal from your inherited/beneficiary annuity contract.

**IRA Qualified Charitable Distribution Form (1307150)**

Make a qualified charitable distribution from your traditional IRA or Roth IRA.

## Financial Transaction Forms (cont'd) [Click on form name to view, download or print](#)

### **JH Legacy Annuitization Form** (ANNOR)

Receive a guaranteed income stream from your JH Legacy variable annuity contract.

### **JH Legacy Asset Rebalancing Program Enrollment Form** (ANNSR)

Enroll in the Asset Rebalancing Program for your JH Legacy variable annuity contract.  
NY residents [click here](#).

### **JH Legacy Dollar Cost Averaging Program Enrollment Form** (ANNDCA)

Enroll in the Dollar Cost Averaging Program for your JH Legacy variable annuity contract.  
NY residents [click here](#).

### **JH Legacy Investment Option Change Form** (ANNIO)

Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your JH Legacy variable annuity contract.  
NY residents [click here](#).

### **Non-ERISA Loan Request Form** (130716)

Request a loan from your variable annuity contract.

### **Pre 59<sup>1/2</sup> Systematic Withdrawal Program Enrollment Form** (130717)

If you are under age 59<sup>1/2</sup>, request a series of substantially equal periodic payments to your account.

### **TBOT Annuitization Form** (130713TBOT)

Receive a guaranteed income stream from your TBOT annuity contract.

### **TBOT Investment Option Change Form** (ANNIO TBOT)

Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your TBOT variable annuity contract.

### **Venture Opportunity Series Asset Rebalancing Enrollment Form** (1307185)

Enroll in the Asset Rebalancing Program for your Venture Opportunity Series variable annuity contract.  
NY residents [click here](#).

### **Venture Opportunity Series Investment Option Change Form** (1307218)

Make investment option transfers on a one-time basis for your Venture Opportunity Series variable annuity contract. NY residents [click here](#).

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**Venture Series Asset Rebalancing Program Enrollment Form (130718)**

Enroll in the Asset Rebalancing Program for your Venture Series variable annuity contract.  
NY residents [click here](#).

**Venture Series Dollar Cost Averaging Program Enrollment Form (130709)**

Enroll in the Dollar Cost Averaging Program for your NY Venture Series annuity contract.  
NY residents [click here](#).

**Wealthmark Series Asset Rebalancing Program Enrollment Form (150718)**

Enroll in the Asset Rebalancing Program for your Wealthmark Series variable annuity contract.  
NY residents [click here](#).

**Wealthmark Series Dollar Cost Averaging Program Enrollment Form (150709)**

Enroll in the Dollar Cost Averaging Program for your Wealthmark Series variable annuity contract.  
NY residents [click here](#).

**Wealthmark Series Investment Option Change Form (150721)**

Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your Wealthmark Series variable annuity contract.  
NY residents [click here](#).

## Maintenance Forms

Click on form name to view, download or print

### **Alternative Issue State Verification Form (1307108)**

When the owner/applicant of an annuity contract is signing an application outside his or her resident state.

### **Annuitant Change Form (1307137)**

Change or add an annuitant to your annuity contract.

### **Block Transfer Authorization Form (1307145)**

Change the broker-dealer of record on your annuity contract.

### **Edward Jones Restricted Beneficiary Payout Form (1307163)**

Restrict the payout options for one or more of your designated beneficiaries from a Ventury Opportunity or JH Liberty annuity contract.

### **Income Plus for Life Rider Election Form (1307182)**

Replace your current Principal Plus for Life, Principal Returns or Income Plus for Life with the Income Plus for Life with Quarterly Step Up Review rider, single or joint.

### **JH Value Enhancement Rider/ CAREAdvantage Benefit Authorization Form (1307203)**

Verify your eligibility before receiving benefits from your JH Value Enhancement rider/ CAREAdvantage Benefit.

### **JH Value Enhancement Rider/ CAREsolutions Plus Benefit Authorization Form (1304206)**

Verify your eligibility before receiving benefits from your JH Value Enhancement rider/ CAREsolutions Plus Benefit.

### **Licensing/Appointment Form (130724)**

Appoint a broker/dealer, brokerage general agency, or insurance agency to your annuity contract.

### **List Billing Request Form (130723)**

Request a list bill from John Hancock for a retirement plan. List bills provide a list of participants who have an annuity with John Hancock and their designated contributions.

### **Non-Qualified Death Benefit 1035 Acknowledgement Form (1307307)**

If you are a receiving carrier to acknowledge receipt of the beneficiary's life expectancy distribution.

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**Power of Attorney Affidavit Form**  
(1307136)

Certify that a power-of-attorney executed by a John Hancock annuity contract owner remains in effect.

**Withdrawal Benefit Rider Exchange Election Form** (1307158)

Elect or exchange to a new optional Withdrawal Benefit rider.

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## Special Request Forms

Click on form name to view, download or print

### **Collateral Assignment of Contract Form (130725)**

Assign your annuity contract as collateral.

### **Company Complaint Form (PS5192US)**

File a complaint in relation to a Life Insurance, Long-Term Care and/or policy or contract.

### **Divorce Distribution Instructions Form (1307192)**

Facilitate the change of ownership, distribution, or transfer of a deferred annuity contract related to divorce.

### **JH Legacy Nursing Home Waiver Form (ANNNHW)**

Apply for a waiver of withdrawal charge benefits due to nursing home confinement.

### **Roth Conversion Form (130705)**

Convert the full value of an existing John Hancock SIMPLE IRA, SEP IRA, Traditional IRA, or other Qualified Plan to a Roth IRA.

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