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# Complete Website Instructions

## Link to Pension Website:

<https://www.midlandnationalpension.com>

## Creating Your Account:

1. Click on the 'Create Account' button' located at the bottom of the screen

Help Contact Us



Home About Us Policy Information Client Services Tax Information Company Financials

## Midland National Pension

Serving the needs of XXXXX pension participants



Login

[Forgot your password?](#)

Create Account

[Need help?](#)

2. Provide the information requested on the screen:

- First Name
- Last Name
- Email Address (This is required to be entered twice for verification purposes)
- Password (Create a password here. Password requirements are listed on the screen. This is also required to be entered twice for verification purposes.)
- Certificate Number (located on Page 2 of your Welcome Packet)
- Last Four Digits of Social Security Number
- Your Birthdate (MM/DD/YYYY format)
- CAPTCHA Verification (type in the value provided in the box displayed below this field)

Contact Us



Home About Us Policy Information Client Services Tax Information Company Financials

### Create New Login

- The email address entered must be valid as it will be used as your user ID for this site as well as for communicating any submitted changes to information.
- Your password for your login must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,(),
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us.  
Email: [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)  
Phone: 1-833-496-0546

First Name

Last Name

Email Address (Will be your user ID)

Re-enter Email Address

Password (See above for requirements)

Re-enter Password

Certificate Number [Can't find your Certificate Number?](#)

Last Four Digits of Your Social Security Number (xxx-xx-####)

Your Birthdate (MM/DD/YYYY)

CAPTCHA Verification



Create Login

Reset

Cancel


3. If you have trouble locating your Certificate Number, click on the 'Can't find your Certificate Number?' link located to the right of the Certificate Number field label

Certificate No. [Can't find your Certificate Number?](#)

4. The following window will be displayed

### Where to Find Your Certificate Number

You will find your certificate number located on Page 2 of your Welcome Packet. See the example below:

 <b>MIDLAND NATIONAL</b> A Sammons Financial Company	4225 38 <sup>th</sup> St. S Suite 201 Fargo, ND 58104
Certificate Number	323456
Full Name	HERMAN MUNSTER
Date of Birth	1/1/1900
Gender	M
Last 4 of SSN	1111
Address	1313 MOCKINGBIRD LANE MOCKINGBIRD HEIGHTS, WA 93745

- Your certificate number will start with the number '3'
- Your certificate number will be six digits in length

If you have questions or concerns, please contact us via the following:

**Email:** [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)

**Phone:** 1-833-496-0546

5. Click on the 'Create Login' button located at the bottom of the screen

**NOTE:** This will take some time to register so please be patient. Do not attempt to click on 'Create Login' a second time

Contact Us



Home About Us Policy Information Client Services Tax Information Company Financials

## Create New Login

- The email address entered must be valid as it will be used as your user ID for this site as well as for communicating any submitted changes to information.
- Your password for your login must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,^,.,()
  - Password must not contain any part of your username (ex. if username is 'smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us.  
Email: [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)  
Phone: 1-833-496-0546

First Name

Last Name

Email Address (Will be your user ID)

Re-enter Email Address

Password (See above for requirements)

Re-enter Password

Certificate Number [Can't find your Certificate Number?](#)

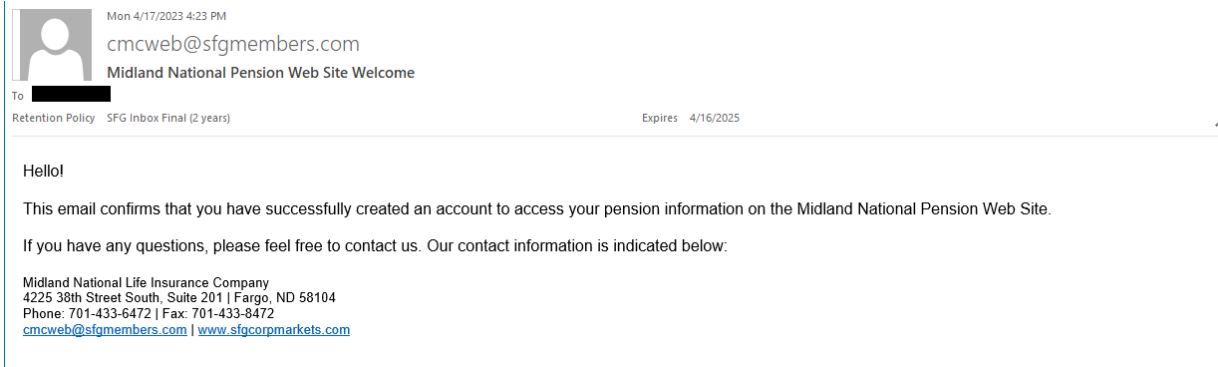
Last Four Digits of Your Social Security Number (xxx-xx-####)

Your Birthdate (MM/DD/YYYY)

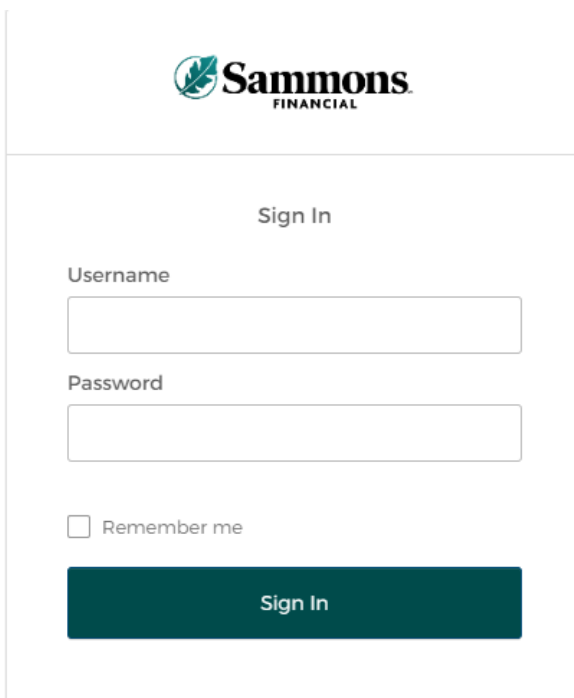
CAPTCHA Verification



- An email message is sent to the individual who has registered for an account to the email address provided during the registration process.

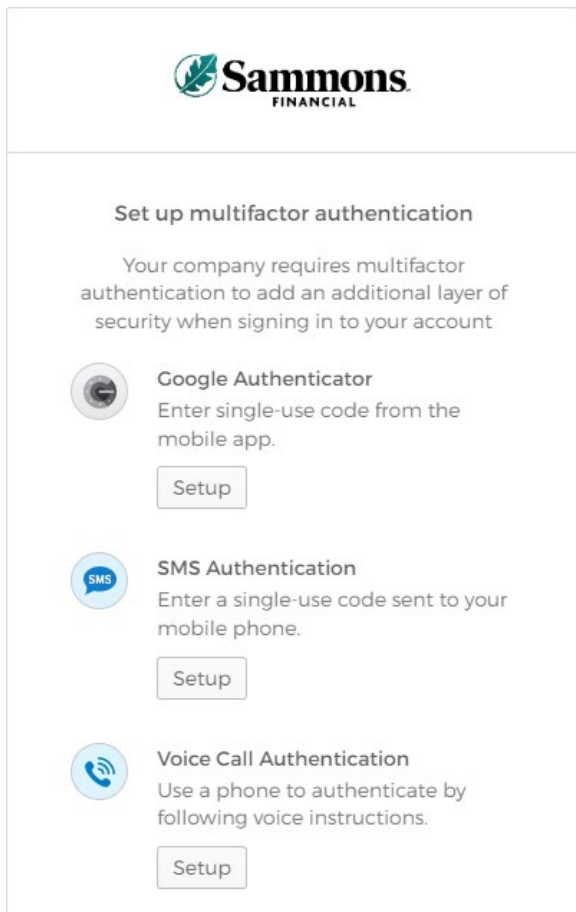


- Once the registration is complete, the following screen will be displayed



- Type in the username and password you created during the registration process

9. When registering for the first time, the following screen will display



10. Select **ONE** of the methods indicated on the screen in order to 'authenticate'. This is just another way for us to ensure the safety of your information. The different methods are described below:

- **Google Authenticator**—this method will require you to download the Google Authenticator app onto your mobile device. An authentication code will be provided within Google Authenticator.
- **SMS Authentication**—this method will send the authentication code via a text message to your mobile device. This is the quickest and most common method for authentication.
- **Voice Call Authentication**—this method will initiate a call to your mobile device and provide you with an authentication code.

For screenshots of each of these methods, refer to [Appendix A](#) in this document.

**NOTE:** The authentication process will only be required in the following situations:

1. Logging into your account for the first time
2. Logging into your account with a different device than the one used for registration
3. More than 90 days have elapsed since you logged into your account


11. Once you have completed the multifactor authentication, the following screen will be displayed:

Help Contact Us Logout

**MIDLAND NATIONAL**  
A Sammons Financial Company

Home About Us Policy Information Client Services Tax Information Company Financials

Welcome <Your Name>



View Policy  
Change your password  
Change your email



12. If you need to clear out your information, click on the 'Reset' button located at the bottom of the screen



### Create New Login

- The email address entered must be valid as it will be used as your user ID for this site as well as for communicating any submitted changes to information.
- Your password for your login must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,(),
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us.  
Email: [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)  
Phone: 1-833-496-0546

First Name

Last Name

Email Address (Will be your user ID)

Re-enter Email Address

Password (See above for requirements)

Re-enter Password

Certificate Number [Can't find your Certificate Number?](#)

Last Four Digits of Your Social Security Number (xxx-xx-####)

Your Birthdate (MM/DD/YYYY)

CAPTCHA Verification



13. If you don't wish to create an account and be returned to the Home page, click on the 'Cancel' button located at the bottom of the screen



### Create New Login

- The email address entered must be valid as it will be used as your user ID for this site as well as for communicating any submitted changes to information.
- Your password for your login must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,(),
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us.  
Email: [cm-ptt@sfgmembers.com](mailto:cm-ptt@sfgmembers.com)  
Phone: 1-833-496-0546

First Name

Last Name

Email Address (Will be your user ID)

Re-enter Email Address

Password (See above for requirements)

Re-enter Password

Certificate Number [Can't find your Certificate Number?](#)

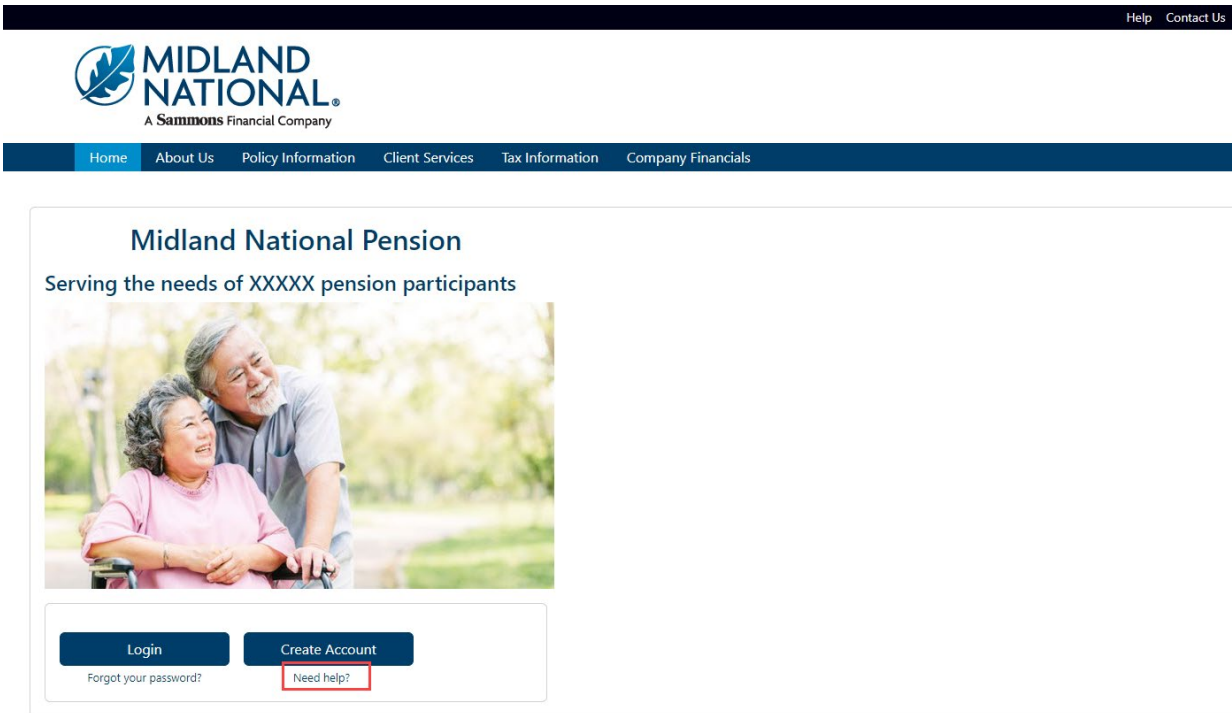
Last Four Digits of Your Social Security Number (xxx-xx-####)

Your Birthdate (MM/DD/YYYY)

CAPTCHA Verification



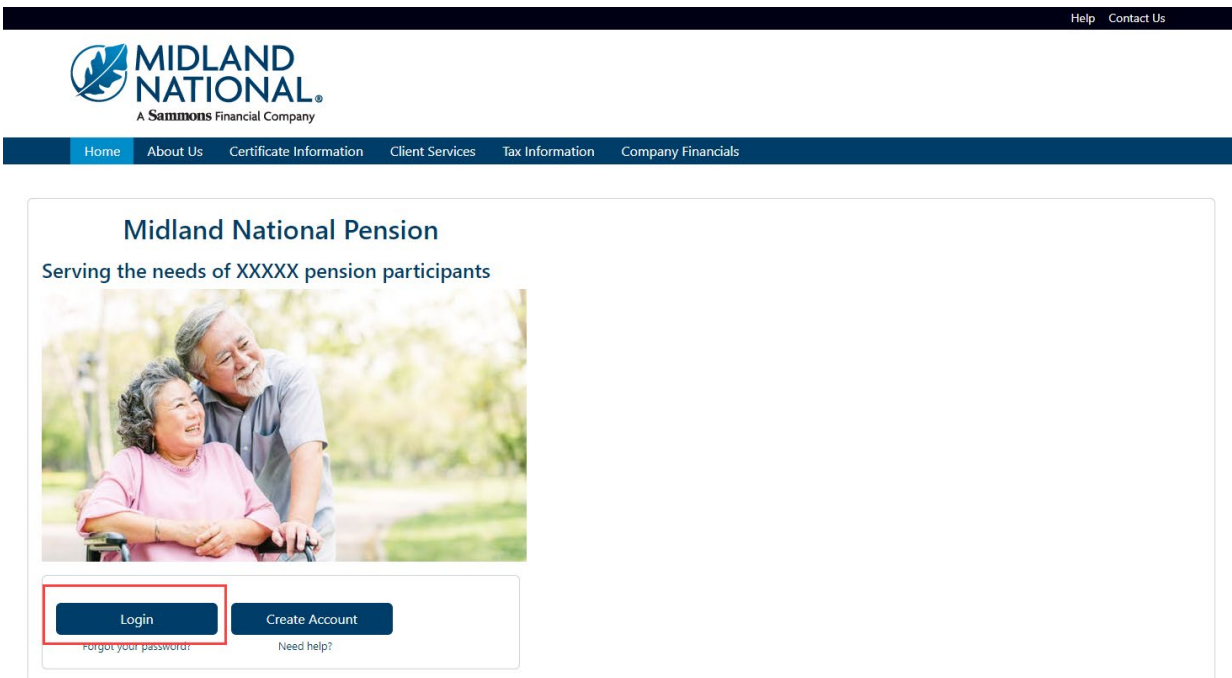
14. If you need additional help with registering, click on the 'Need help?' link located under the 'Create Account' button. This will open a PDF document that outlines the steps for creating an account.



The screenshot shows the Midland National Pension website. At the top right, there are links for 'Help' and 'Contact Us'. The Midland National logo is on the left, with the text 'A Sammons Financial Company' below it. A navigation bar contains links for 'Home', 'About Us', 'Policy Information', 'Client Services', 'Tax Information', and 'Company Financials'. The main content area features the title 'Midland National Pension' and the subtitle 'Serving the needs of XXXXX pension participants'. Below this is a photograph of an elderly couple. At the bottom, there are two buttons: 'Login' and 'Create Account'. Under the 'Login' button is the text 'Forgot your password?'. Under the 'Create Account' button is the text 'Need help?', which is highlighted with a red box.

**Logging In:**

1. Click on the 'Login' button located at the bottom of the screen



This screenshot is identical to the one above, showing the Midland National Pension website. However, in this version, the 'Login' button is highlighted with a red box, and the 'Need help?' link is no longer highlighted.

2. Type in your username and password



Sign In

Remember me

Sign In

3. Click on the 'Sign In' button



Sign In

Remember me

Sign In

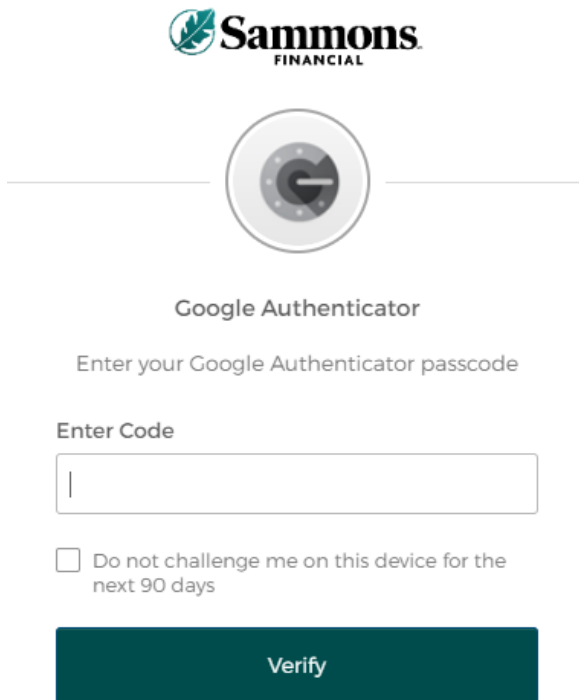
4. You may be asked to authenticate in the following situations:

- a. If you are logging in for the first time
- b. If you haven't logged into your account for at least 90 days
- c. If you are logging into your account with a different device

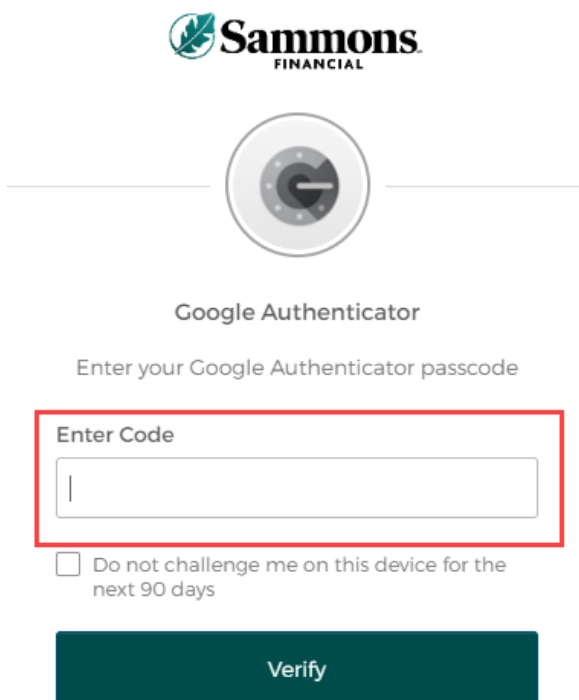
**NOTE:** Screens below will show an example for each authentication type

**Google Authenticator:**

- a. The following screen appears





- b. Go into your Google Authenticator app located on the device you used to register your account
- c. Type in the authentication code displayed in Google Authenticator within the 'Enter Code' field



- d. To ensure that you don't receive this message every time you access your account, click on the checkbox under the 'Enter Code' field that displays the following verbiage:

'Do not challenge me on this device for the next 90 days'



Google Authenticator

Enter your Google Authenticator passcode

Enter Code

  
 Do not challenge me on this device for the next 90 days  

- e. Click on the 'Verify' button

Google Authenticator

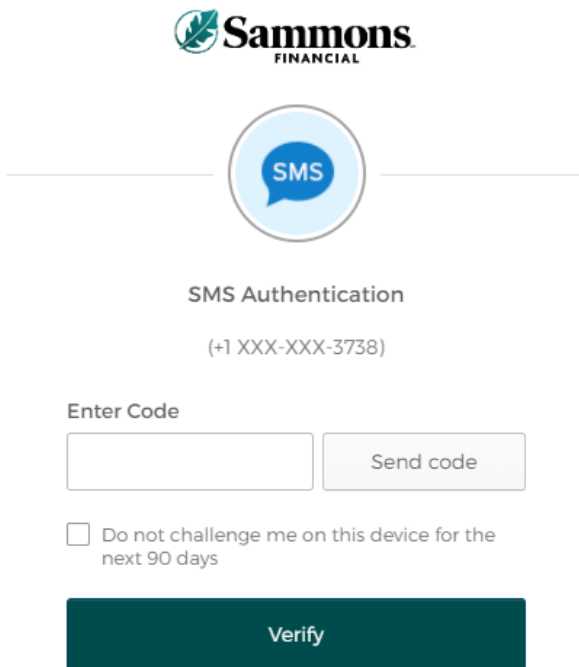
Enter your Google Authenticator passcode

Enter Code

  
 Do not challenge me on this device for the next 90 days

**SMS Authentication:**

- a. The following screen appears



**Sammons**  
FINANCIAL

SMS

SMS Authentication  
(+1 XXX-XXX-3738)

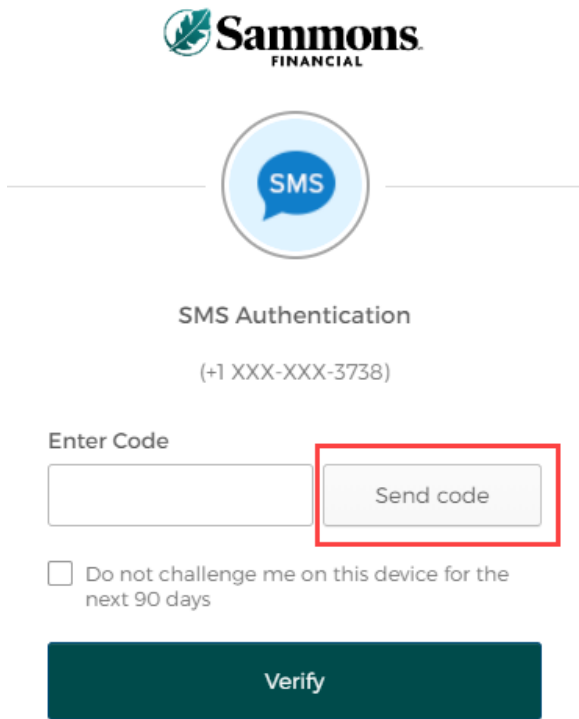
Enter Code

Send code

Do not challenge me on this device for the next 90 days

Verify

- b. Click on the 'Send code' button



**Sammons**  
FINANCIAL

SMS

SMS Authentication  
(+1 XXX-XXX-3738)


Enter Code


Send code

Do not challenge me on this device for the next 90 days

Verify

- c. Type in the authentication code you received via the authentication method you selected when you registered your account within the 'Enter Code' field





**SMS Authentication**  
(+1 XXX-XXX-3738)


**Enter Code**


Do not challenge me on this device for the next 90 days

**Verify**

- d. To ensure that you don't receive this message every time you access your account, click on the checkbox under the 'Enter Code' field that displays the following verbiage:

'Do not challenge me on this device for the next 90 days'





**SMS Authentication**  
(+1 XXX-XXX-3738)



**Enter Code**

Do not challenge me on this device for the next 90 days

**Verify**



- e. Click on the 'Verify' button

SMS Authentication



(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days  

**Voice Call Authentication:**

- a. The following screen appears



Voice Call Authentication

(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days

- b. Click on the 'Call' button



Voice Call Authentication

(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days  

- c. You will receive a call from a phone number based upon the authentication method you selected when you registered your account. Type in the code provided in the phone call within the 'Enter Code' field

Voice Call Authentication



(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days

- d. To ensure that you don't receive this message every time you access your account, click on the checkbox under the 'Enter Code' field that displays the following verbiage:

'Do not challenge me on this device for the next 90 days'



  
  

Voice Call Authentication  
(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days  

- e. Click on the 'Verify' button

Voice Call Authentication  
(+1 XXX-XXX-3738)

Enter Code

  
 Do not challenge me on this device for the next 90 days


5. The following screen will be displayed:

Help Contact Us Logout

**MIDLAND NATIONAL**  
A **Sammons** Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

Welcome <Your Name>



View Certificate  
Change your password  
Change your email


## What's Available on the Website

### Top Navigation

Section	Description
Midland National logo	Click on the logo to return to the Welcome/Home page of the website
Home	Click here to return to the Welcome/Home page of the website
About Us	Contains information about Midland National, including our financial strength
Certificate Information	Secure section of the website. Contains each user's specific certificate information along with the ability to request some changes to that information
Client Services	Secure section of the website. Allows the user the ability to make a variety of changes to their information.
Tax Information	Secure section of the website. Allows the user to link to our 1099 tax form administrator to view and/or download a copy of this document
Company Financials	Contains company reports (Midland National and Pension) and financial strength brochure
Help (upper right corner)	Contains useful documentation for making changes or navigating the website
Contact Us (upper right corner)	Opens a 'Contact Us' page containing the different ways to contact us regarding your Midland National pension

### About Us:

[Help](#) [Contact Us](#)




[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)


### About Us

We are part of Sammons Financial Group (SFG), whose member companies offer a diverse portfolio of products, including life insurance, annuities, and retirement solutions. Sammons Financial Group includes North American Company for Life and Health Insurance®, Midland National® Life Insurance Company, Sammons Institutional Group®, and Beacon Capital Management.


To learn more, click on the icons below:




A Sammons Financial Company



A Sammons Financial Company



SAMMONS INSTITUTIONAL GROUP®



BEACON CAPITAL MANAGEMENT™  
A Sammons Financial Company

### Financial Strength

#### A Proud History of Strength and Success

As a privately held company, Sammons Financial Group is not driven by short-term earnings pressures. We plan for the long term, which has resulted in a consistently strong performance throughout the years - even during tough economic times. We honor our commitments to our customers with a disciplined and conservative investment strategy. We closely monitor our investments, maintain a balanced and diversified portfolio, and a strong capital position. Our bottom line is the bottom line when it comes to honoring the financial commitments we make to our customers.

View our Financial Strength flyer:

[Financial Strength 2022](#)

#### Sammons Financial Group by the Numbers\*

- More than 1,737,913 Life insurance and annuity policies held
- More than \$115.6 billion in total assets
- \$360.4 billion life insurance in force
- \$1.3 billion life insurance claims paid

## Certificate Information (login required):



[Print](#)

### Participant Information

<b>Participant Name:</b> Herman Munster		<b>Phone Number:</b> <a href="#">Change Address</a>	
<b>Address:</b> 1313 Mockingbird Lane			
<b>City:</b> Mockingbird Heights		<b>State:</b> WA	<b>Zip Code:</b> 11111
<b>Email:</b> hmunster@gmail.com		<b>Date of Birth:</b> 01/01/1793	

### Certificate Information

<b>Certificate Number:</b> 111111	<b>Certificate Type:</b> Single Life	<b>Status:</b> ACTIVE
<b>Normal Retirement Date:</b>	<b>Early Retirement Date:</b>	<b>Disbursement Status:</b> Deferred
<b>(Projected) Payment Amount*:</b> \$500.00		<b>% Non-Taxable:</b>
<b>Required Commencement Date:</b>	<b>COLA Amount:</b> \$0.00	<b>COLA Percentage:</b> 0.00%

\*Amount is based upon the Normal Retirement Date.

### Earnings Information

<b>Certificate Number:</b> 111111	<b>Frequency:</b> Monthly	<b>Disbursement Start Date:</b> 10/01/2033
<b>Last Disbursement Date:</b>	<b>Next Disbursement Date:</b>	<b>LTD Gross Disbursement:</b> \$0.00

[Print](#)

## Client Services (login required):



### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?


- [View Additional Certificates](#)

Download our [Client Services](#) form.

## Tax Information (login required):

**NOTE:** Number of years available is dependent upon the number of years that the policy has been administered by Midland National.

Help Contact Us Logout



A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials


### Tax Information

1099-R forms are available for the following years:

- [2022](#)
- [2021](#)

## Company Financials:

Help Contact Us Logout




A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials


### Company Reports

NOTE: The links below will open PDF documents. Some documents may be quite large (5-10 MB)

#### Pension Separate Account Annual Statement

[Pension Separate Account Annual Statement 2022](#) 

#### Midland National Annual Statement

[Annual Statement 2022](#) 

[Annual Statement 2021](#) 

[Annual Statement 2020](#) 


[Annual Statement 2019](#) 

[Annual Statement 2018](#) 

#### Financial Strength

[Financial Strength 2021](#) 

## Footer Navigation

<b>Information</b> <a href="#">Contact Us</a> <a href="#">Home Office Closings</a> <a href="#">Midland National History</a> <a href="#">Leadership</a>	<b>Other</b> <a href="#">Terms of Use</a> <a href="#">Privacy</a> <a href="#">Accessibility Statement</a> <a href="#">Careers</a>	<b>Member Companies</b> <a href="#">Midland National</a> <a href="#">Sammons Financial Group</a> <a href="#">Sammons Corporate Markets</a> <a href="#">Sammons Institutional Group</a> <a href="#">Beacon Capital Management</a>	
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<b>Section</b>	<b>Description</b>
Contact Us	Opens a 'Contact Us' page containing the different ways to contact us regarding your Midland National pension. A link is also included in the top right corner of the website
Home Office Closings	Opens the 'Home Office Closings' page which indicates the days our office is not open
Midland National History	Opens the 'Midland National History' page on the Midland National website (not the pension site) in a new web browser page
Leadership	Opens the 'Leadership' page on the Midland National website (not the pension site) in a new web browser page
Terms of Use	Opens a 'Terms of Use' page containing the Terms of Use Agreement for the website. This page can be printed out for your reference
Privacy	Opens the 'Privacy' page on the Midland National website (not the pension site) in a new web browser page. This contains a copy of our privacy notice and privacy policy that is available for download to your computer
Accessibility Statement	Opens the 'Accessibility Statement' page of the Midland National website (not the pension site) in a new web browser page. Contains links to helpful resources regarding website accessibility
Careers	Opens the 'Careers' page on the Sammons Financial Group website (not the pension site) in a new web browser page
Midland National	Opens the Midland National website (not the pension site) in a new web browser page
Sammons Financial Group	Opens the Sammons Financial Group website in a new web browser page
Sammons Corporate Markets	Opens the Sammons Corporate Markets website in a new web browser page
Sammons Institutional Group	Opens the Sammons Institutional Group website in a new web browser page
Beacon Capital Management	Opens the Beacon Capital Management website in a new web browser page





## Contact Us

### Phone

**Toll-Free Number:** 833-496-0546

### Fax

**Fax Number:** 701-433-6625

### Our Address

Midland National Life Insurance Company  
4225 38th Street South  
Suite 201  
Fargo, ND 58104

### Pension or 1099 Questions?

**Email:** [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)

### Website Questions?

**Email:** [CM-PRTWebSupport@sfgmembers.com](mailto:CM-PRTWebSupport@sfgmembers.com)

## Home Office Closings:



## Home Office Closings

[2023 Holiday Schedule](#)

[2024 Holiday Schedule](#)

[2025 Holiday Schedule](#)

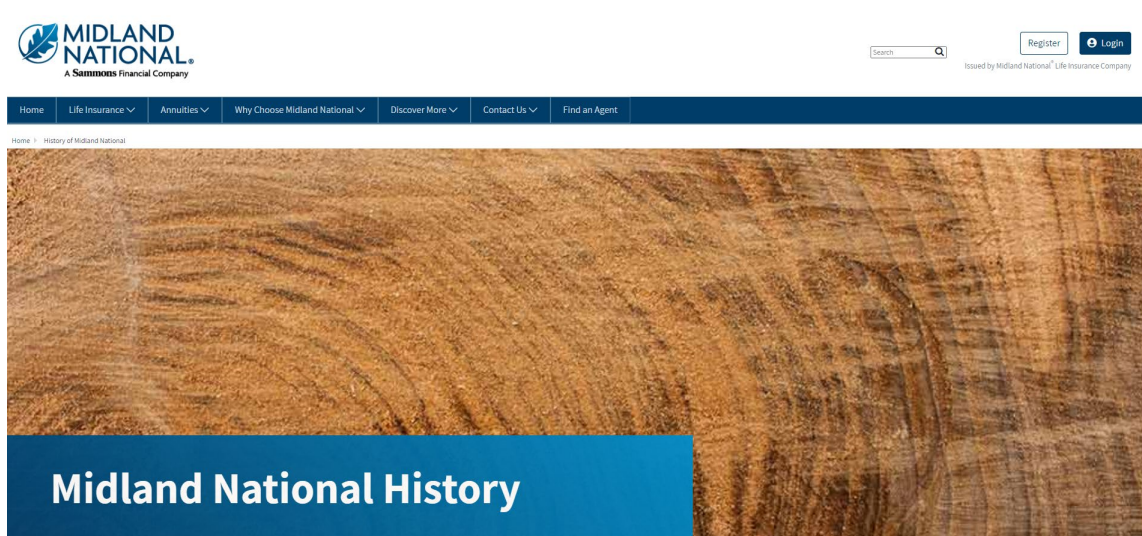
### 2023 Holiday Schedule

Holiday	Date Observed
New Year's Day	Monday, January 2
Martin Luther King, Jr. Day	Monday, January 16
President's Day	Monday, February 20
Good Friday	Friday, April 7
Memorial Day	Monday, May 29
Juneteenth	Monday, June 19
Fourth of July	Tuesday, July 4
Labor Day	Monday, September 4
Thanksgiving Day	Thursday, November 23
Winter Holiday	Monday, December 25

### 2024 Holiday Schedule

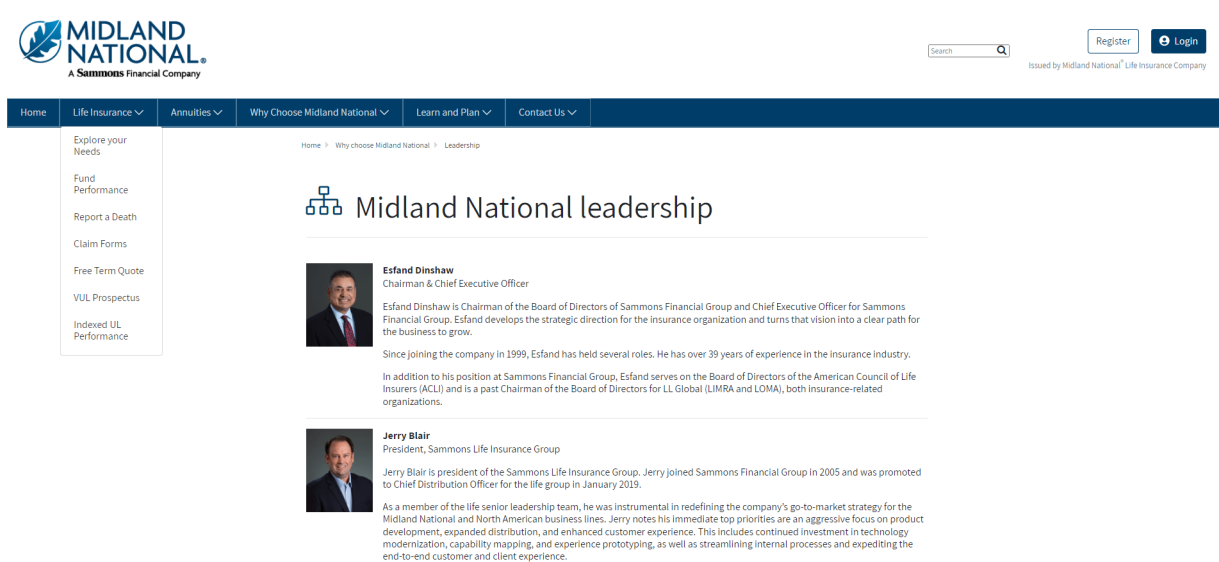
Holiday	Date Observed
New Year's Day	Monday, January 1
Martin Luther King, Jr. Day	Monday, January 15
President's Day	Monday, February 19
Good Friday	Friday, March 29
Memorial Day	Monday, May 27

## Midland National History:



The screenshot shows the top portion of the Midland National website. On the left is the logo for Midland National, a Sammons Financial Company. To the right is a search bar and buttons for 'Register' and 'Login'. Below the logo is a navigation menu with items: Home, Life Insurance, Annuities, Why Choose Midland National, Discover More, Contact Us, and Find an Agent. The main content area features a large background image of a dirt road with tire tracks. A blue banner at the bottom of the image contains the text 'Midland National History' in white.

## Leadership:



The screenshot shows the 'Leadership' page on the Midland National website. The navigation menu includes: Home, Life Insurance, Annuities, Why Choose Midland National, Learn and Plan, and Contact Us. A dropdown menu is open under 'Life Insurance', listing options like 'Explore your Needs', 'Fund Performance', 'Report a Death', 'Claim Forms', 'Free Term Quote', 'VUL Prospectus', and 'Indexed UL Performance'. The main heading is 'Midland National leadership' with a small organizational chart icon. Below this, two leadership profiles are shown:   
**Esfand Dinshaw**, Chairman & Chief Executive Officer. His bio states he is Chairman of the Board of Directors of Sammons Financial Group and Chief Executive Officer for Sammons Financial Group. He develops the strategic direction for the insurance organization and turns that vision into a clear path for the business to grow. Since joining the company in 1999, Esfand has held several roles. He has over 39 years of experience in the insurance industry. In addition to his position at Sammons Financial Group, Esfand serves on the Board of Directors of the American Council of Life Insurers (ACLI) and is a past Chairman of the Board of Directors for LL Global (LIMRA and LOMA), both insurance-related organizations.   
**Jerry Blair**, President, Sammons Life Insurance Group. His bio states he is president of the Sammons Life Insurance Group. Jerry joined Sammons Financial Group in 2005 and was promoted to Chief Distribution Officer for the life group in January 2019. As a member of the life senior leadership team, he was instrumental in redefining the company's go-to-market strategy for the Midland National and North American business lines. Jerry notes his immediate top priorities are an aggressive focus on product development, expanded distribution, and enhanced customer experience. This includes continued investment in technology modernization, capability mapping, and experience prototyping, as well as streamlining internal processes and expediting the end-to-end customer and client experience.

# Terms of Use:



## Terms of Use

Updated July 2022

For the purposes of this Terms of Use Agreement (this "Agreement"), "the Companies" refers to the companies, all wholly owned subsidiaries of Sammons Financial Group, listed below, jointly and individually, as well as to their subsidiaries, affiliates, predecessors, successors and assigns.

Midland National Life Insurance Company®  
North American Company for Life and Health Insurance®  
Sammons Institutional Group, Inc. ®

This Agreement applies to your use of any of the Companies' online interfaces (e.g. websites, applications, or online services) (collectively the "Sites") including any content, functionality, and services offered on or through the Sites, regardless of how you access the Sites.

Your access and use of the Sites and features, transactions, and services provided by the Companies through the Sites (individually and collectively, the "Service") are subject to the terms and conditions in this Agreement. **Please read these terms and conditions carefully before using the Sites. These terms and conditions include provisions (i) requiring arbitration of certain disputes (from which you can opt out within 30 days); (ii) waiving the right to a jury trial; (iii) waiving the right to file a class action lawsuit; (iv) waiving the right to arbitrate a class action; and (v) limiting the Companies' liability.**

The information contained on the Sites is not an offer to sell or a solicitation to buy any insurance product. No insurance product is offered or will be sold in any jurisdiction in which such offer, solicitation, purchase or sale would be unlawful under the laws of such jurisdiction.

By using any aspect of the Service, including by a click-through, you expressly acknowledge that you have read this Agreement and agree to all of its terms and conditions. You represent and warrant that you have the legal capacity to enter a contract in the jurisdiction where you reside. You must agree to this Agreement in order to use the Service, and if you do not accept this Agreement then you may not use any aspect of the Service. This Agreement contains important language governing your use of the Service. It addresses, among other things, information about how we provide the Service, how we or you may terminate the Service, the requirements imposed on you when managing your account, and how we handle disputes (which are handled by binding arbitration in most cases).

Please Read This Carefully and in Full as it is a Binding Contract

**Agreement Updates.** The Companies may update this Agreement at any time, and will post the updated version of this Agreement on the Sites. You understand and agree that you will be deemed to have accepted the updated Agreement if you use any aspect of the Service after the updated Agreement is posted. If at any point you do not agree to any then-current portion of this Agreement, you

# Privacy:



Search

Register

Login

Issued by Midland National Life Insurance Company

Home > Privacy

## Privacy

At Midland National Life Insurance Company (collectively "SFG Member Companies"), we value the privacy of our customers, agents, and website visitors.

We want you to understand your privacy rights while on our websites. If you do not agree with the terms outlined below, do not further access the SFG Member Companies websites. These privacy links describe the ways we gather, use, disclose, and manage information we may collect or utilize from website visitors.

[Download privacy notice](#)

[Download privacy policy](#)

## Accessibility Statement:

The screenshot shows the Midland National website's Accessibility Statement page. At the top left is the Midland National logo, a Sammons Financial Company. To the right is a search bar and a 'Register' button. Below the logo is a navigation menu with items: Home, Life Insurance, Annuities, Why Choose Midland National, Learn and Plan, and Contact Us. The main heading is 'Accessibility statement' with an accessibility icon. The text states: 'At Midland National, we are committed to web accessibility. It is our intention to ensure that everyone, including persons with disabilities, has full and equal access to our digital offerings. Through a genuine, good faith commitment and devotion to web accessibility, we meet the digital accessibility requirements of the Americans with Disabilities Act.' It then lists 'The standard for which we strive' as the WCAG AA Standard, provides a link to 'https://www.w3.org/WAI/standards-guidelines/wcag/', and includes a 'Have feedback?' section with the email 'accessibility@sfgmembers.com'. A 'Resources' section lists: ADA.gov, Section508.gov, Accessible.org, and W3.org/WAI.

## Careers:

The screenshot shows the top of the Sammons Financial Careers page. It features the Sammons Financial logo on the left, a navigation menu with 'About Us', 'Careers', 'Our Company', and 'Contact Us' in the center, and a search icon on the right. Below the navigation is a large banner image of a forest with the word 'Careers' overlaid in white text.

Home > **Careers**

### Life's short. Love what you do.

We get it. In today's unpredictable world you need more than just a job and a paycheck. You deserve the whole package: a career that rewards you with growth, competitive pay, health coverage that works for your family, and retirement planning designed with your future goals in mind.

What about feeling valued and a sense of belonging? If you're tired of feeling like you're clocking in and out, day after day, without being recognized for who you are and what you bring to a team; if you're looking for leaders and coworkers who support you; if you want a career at a company that makes you feel at home, start here.

Because if we've learned anything in recent times, it's that life is too precious to waste a single minute of it feeling stuck in a job you don't love. Start your journey with Sammons Financial Group, where good company makes all the difference.

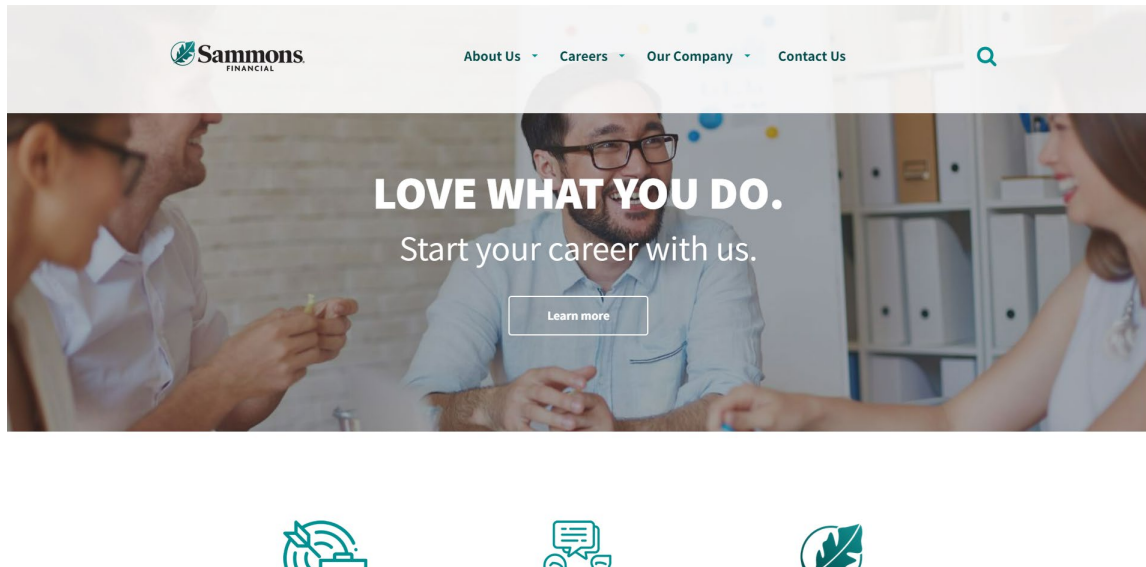
Good culture

## Midland National:



The image shows the top portion of the Midland National website. At the top left is the logo for MIDLAND NATIONAL, A Sammons Financial Company. To the right of the logo is a search bar with a magnifying glass icon, and further right are buttons for 'Register' and 'Login'. Below the logo and search area is a dark blue navigation bar with the following links: Home, Life Insurance, Annuities, Why Choose Midland National, Discover More, Contact Us, and Find an Agent. The main hero section features a background image of autumn leaves with sunlight filtering through. A dark blue banner on the left side of the hero section contains the text 'Plan your financial future with confidence.' Below this banner, a small line of text reads 'A message to our valued customers from Chairman and CEO Esfand Dinshaw.' with a link 'Click here to read the message'.

## Sammons Financial Group:



The image shows the top portion of the Sammons Financial Group website. At the top left is the logo for Sammons FINANCIAL. To the right of the logo are navigation links: About Us, Careers, Our Company, and Contact Us. Further right is a search bar with a magnifying glass icon. The main hero section features a background image of three people (two men and one woman) in an office setting, smiling and engaged in conversation. A large white text overlay reads 'LOVE WHAT YOU DO.' followed by 'Start your career with us.' Below this text is a white button with the text 'Learn more'. At the bottom of the hero section, there are three teal icons: a leaf, a speech bubble with a leaf, and a leaf inside a circle.

Contact Us | Help | Login | Search





Home | About Us | Company Financials

## Corporate Markets Group

Sammons Corporate Markets Group, as a member of Sammons Financial Group (SFG), serves corporate customers such as banks, credit unions, as well as other business sectors. We are based in Fargo, North Dakota, and are a separate business unit from the retail life insurance and annuity operations of Midland National<sup>®</sup> Life Insurance Company and North American Company for Life and Health Insurance<sup>®</sup>. We are devoted to understanding the needs of our customers and providing them with innovative, state-of-the-art products.

Companies purchase life insurance to fund benefit obligations, such as medical costs and retirement benefits. While traditional life insurance serves as protection for premature death, in Corporate Markets, life insurance is the most economical method to fund employee benefits. These benefits help companies:

- retain and reward key people
- provide supplemental retirement income
- allow employees to defer income until retirement
- provide security for an employees' survivors

In 1982, Sammons Corporate Markets Group, which was then known as Western States Life Insurance Company (and later became part of Sammons Financial Group), was the first company to provide Bank-Owned Life Insurance (BOLI) products. We have grown consistently in the BOLI market since that time, currently serving over 1,500 commercial bank customers.

In 2009, Sammons Corporate Markets Group began serving credit unions and small businesses with funding solutions. While credit unions are still in the financial services sector, we quickly realized that they were different than banks. In 2010, we modified our offerings for credit unions, providing them with their own product line tailored to their needs. Today, we are currently serving over 700 credit union customers.

In 2020, Sammons Corporate Markets Group entered the Pension Risk Transfer (PRT) market by leveraging its expertise in working with institutions to provide customized solutions for their employee benefit programs. Our financial strength along with an in-house administrative system and team that is specifically dedicated to providing knowledgeable and friendly customer service, plan sponsors can be confident when choosing us to handle their future pension benefit obligations. In addition, with our ESPOP ownership structure and long-term commitment to the PRT market you can count on us long into the future.

**At Sammons Corporate Markets Group, creating value through innovation and service is the key to our success!**

Sammons Institutional Group:



[▶ Sign In / Enter Access Code](#)

[FINANCIAL PROFESSIONALS](#) | 
 [LIVEWELL<sup>®</sup> RETIREMENT SERIES](#) | 
 [OUR COMPANY](#) | 
 [CONTACT US](#)

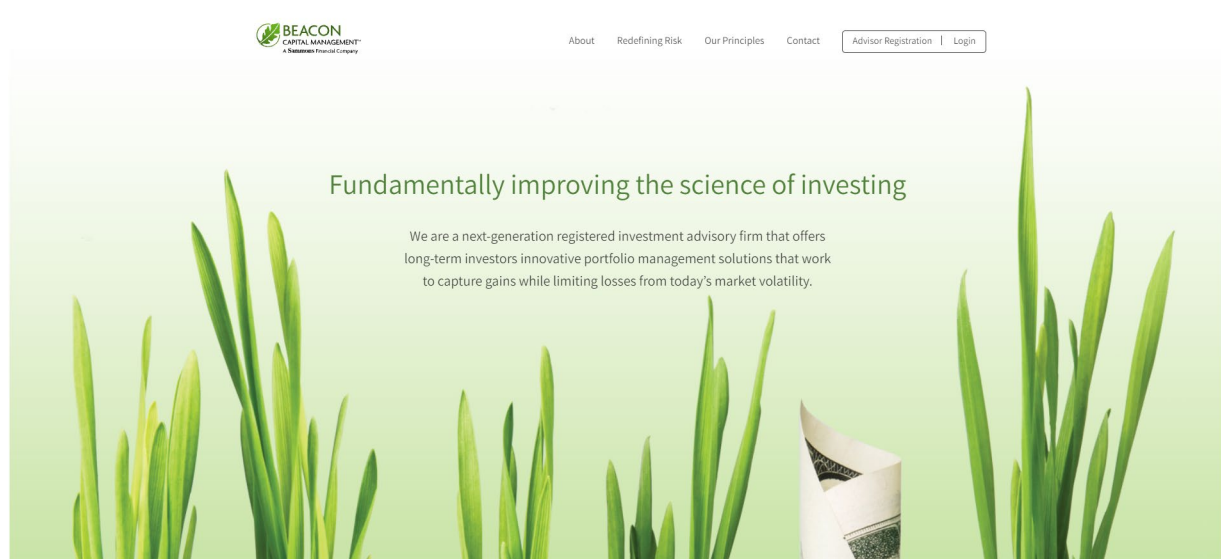


## Helping you enjoy a life of living well.

At Sammons Retirement Solutions<sup>®</sup>, we know you want to live well and retire well. In order to do that, you need clear-cut choices for retirement planning. As a division of Sammons Institutional Group<sup>®</sup>, Inc., we're able to offer simple, innovative, and straightforward individual retirement accounts (IRAs) and annuities that can help you live well in retirement.

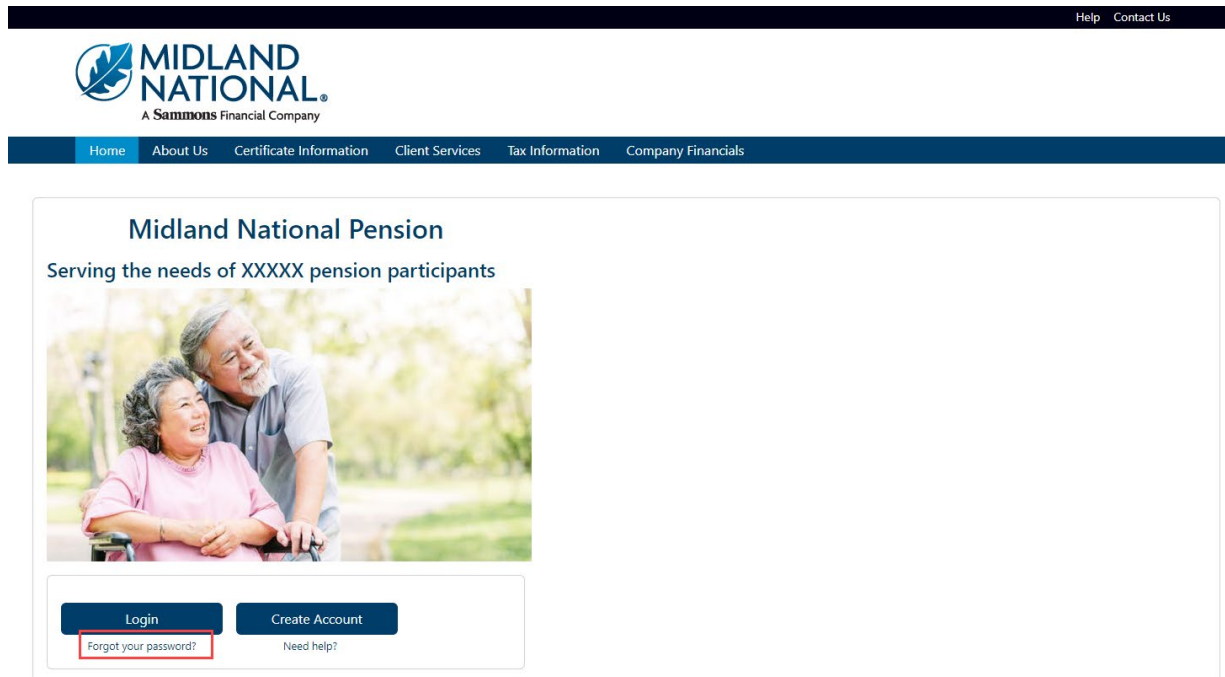
- [Explore the LiveWell<sup>®</sup> Retirement Series »](#)
- [Why choose Sammons Retirement Solutions? »](#)
- [Sales tools & materials for financial professionals »](#)
- [Access your accounts »](#)
- [Report a death »](#)

## Beacon Capital Management:



### Forgot your Password?:

1. Click on the 'Forgot my password?' link located below the 'Login' button




2. When the following screen appears, do the following:
  - a. Type in your email address (this is your user id)
  - b. Type in the last four digits of your social security number
  - c. Type in your birth date (MM/DD/YYYY format)
  - d. CAPTCHA Verification
  - e. Click on the 'Submit Check' button

### Reset Login Password (Step 1)

- This is the first step in a three step process to reset your password
- Provide the following:
  - **Email Address**--The email address entered must be the same one you used for your login account
  - **Birth Date**--Enter your birth date in MM/DD/YYYY format
  - **Last 4 of SSN**--Enter the last four digits of your Social Security Number
  - **CAPTCHA Verification**--Enter the CAPTCHA code displayed on the screen below
- Click on the 'Submit Check' button below to move to the second step
- Click on the 'Reset' button to clear out your information
- Click on the 'Cancel' button to cancel the change and be returned from the Home page
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us  
Email: [cm-prt@sgmembers.com](mailto:cm-prt@sgmembers.com)  
Phone: 1-833-496-0546

**Email Address** (This is your user ID)

  
**Last Four Digits of Your Social Security Number (xxx-xx-####)**  
  
**Your Birthdate (MM/DD/YYYY)**  
  
**CAPTCHA Verification**  
  
 (CAPTCHA verification value)



3. The following screen will be displayed

Help Contact Us

**MIDLAND NATIONAL**  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

### Reset Login Password (Step 2)

- This is the second step in a three step process to reset your password
- Below are one or more multi-authentication factor(s) you have assigned to your account
- Select the one that you want to use to obtain a verification code from. **NOTE:** This code will be needed in order to reset your password on the next page
- Click on the 'Continue' button below to move to the third step

Select how to obtain the verification code

<see screenshots below>

Continue

4. The verification process shown can be any one of the following methods:

*Goggle Authenticator (enter a single-use code from the mobile app)*

Help Contact Us

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### Reset Login Password (Step 2)

- Below are one or more multi-authentication factor(s) you have assigned to your account
- Select the one that you want to use to obtain a verification code from.
- This code will be needed in order to reset your password on the next page.

Select how to obtain the verification code

Use token from GOOGLE

Continue

*SMS Authentication (enter a single-use code sent to your mobile phone)*

Help Contact Us

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### Reset Login Password (Step 2)

- This is the second step in a three step process to reset your password
- Below are one or more multi-authentication factor(s) you have assigned to your account
- Select the one that you want to use to obtain a verification code from. **NOTE:** This code will be needed in order to reset your password on the next page
- Click on the 'Continue' button below to move to the third step

Select how to obtain the verification code

Text (###)###-3738

Continue

Help Contact Us

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### Reset Login Password (Step 2)

- This is the second step in a three step process to reset your password
- Below are one or more multi-authentication factor(s) you have assigned to your account
- Select the one that you want to use to obtain a verification code from. **NOTE:** This code will be needed in order to reset your password on the next page
- Click on the 'Continue' button below to move to the third step

Select how to obtain the verification code

Call (###)###-3738

Continue

- Click on the 'Continue' button
- The following screen displays

Help Contact Us

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A Sammons Financial Company

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### Reset Login Password (Step 3)

- This is the final step in a three step process to reset your password
- Please enter the verification code you obtained from the method you selected on the previous page. If you are unable to obtain a code, please contact us  
Email: [cm\\_prt@sfgmembers.com](mailto:cm_prt@sfgmembers.com)  
Phone: 1-833-496-0546
- Your new password must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @, !, \$, %, ^, &, \*.
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'Smith' or 'domain')
  - Password must not contain your first or last name.
- Click on the 'Change Password' button below to complete the password reset process

Verification Code

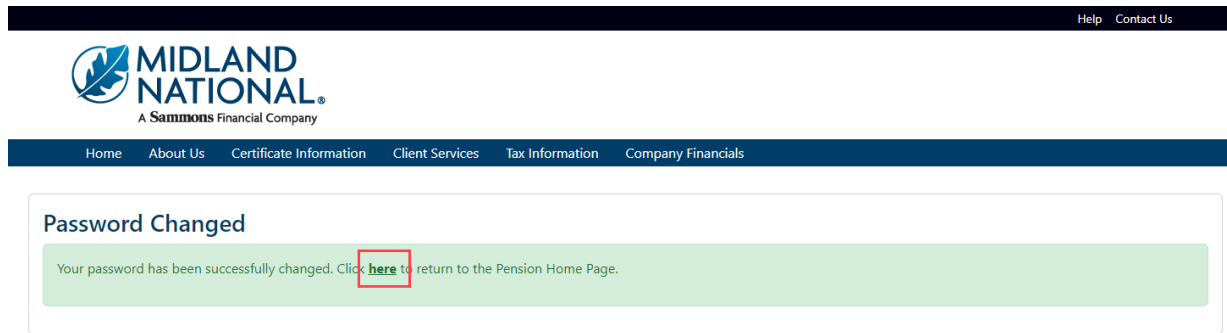
New Password (See above for requirements)

Re-enter New Password

Change Password

- Type in your verification code and your new password (must be entered twice), which must follow the password requirements shown on the screen.
- Click on the 'Change Password' button at the bottom of the screen

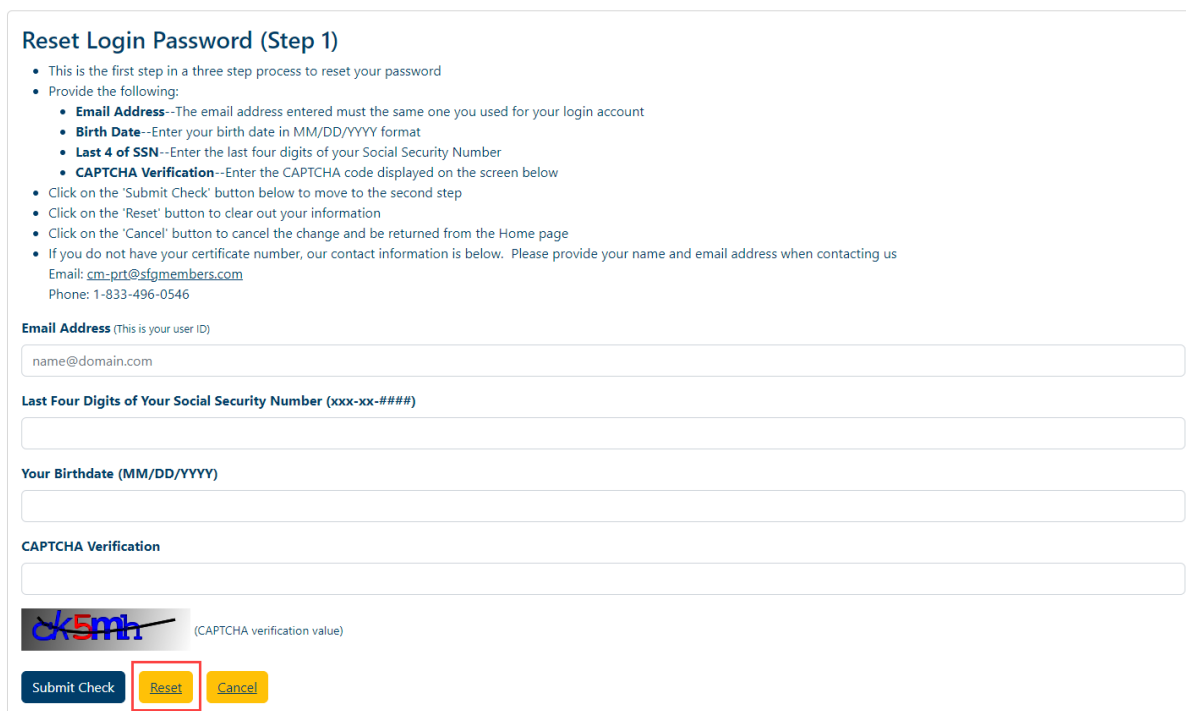
9. The following is displayed



The screenshot shows the top navigation bar of the Midland National website, which is a Sammons Financial Company. The navigation bar includes links for Home, About Us, Certificate Information, Client Services, Tax Information, and Company Financials. Below the navigation bar, a green notification box displays the message: "Password Changed. Your password has been successfully changed. Click [here](#) to return to the Pension Home Page." The word "here" is highlighted with a red box.

10. Click on the word 'here' to return to the Home page

11. To clear out the previous information, click on the 'Reset' button



The screenshot shows the "Reset Login Password (Step 1)" form. The form includes a list of instructions and several input fields. The instructions are:

- This is the first step in a three step process to reset your password
- Provide the following:
  - Email Address**--The email address entered must be the same one you used for your login account
  - Birth Date**--Enter your birth date in MM/DD/YYYY format
  - Last 4 of SSN**--Enter the last four digits of your Social Security Number
  - CAPTCHA Verification**--Enter the CAPTCHA code displayed on the screen below
- Click on the 'Submit Check' button below to move to the second step
- Click on the 'Reset' button to clear out your information
- Click on the 'Cancel' button to cancel the change and be returned from the Home page
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us

Contact information:  
Email: [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)  
Phone: 1-833-496-0546

The form fields are:

- Email Address** (This is your user ID): name@domain.com
- Last Four Digits of Your Social Security Number (xxxx-xx-####)**: [Empty field]
- Your Birthdate (MM/DD/YYYY)**: [Empty field]
- CAPTCHA Verification**: [Empty field]

A CAPTCHA verification value is displayed as "5mh" with a red box around it. Below the form are three buttons: "Submit Check", "Reset" (highlighted with a red box), and "Cancel".

12. To cancel re-setting your password and be returned to the Home page, click on the 'Cancel' button

### Reset Login Password (Step 1)


- This is the first step in a three step process to reset your password
- Provide the following:
  - Email Address**--The email address entered must be the same one you used for your login account
  - Birth Date**--Enter your birth date in MM/DD/YYYY format
  - Last 4 of SSN**--Enter the last four digits of your Social Security Number
  - CAPTCHA Verification**--Enter the CAPTCHA code displayed on the screen below
- Click on the 'Submit Check' button below to move to the second step
- Click on the 'Reset' button to clear out your information
- Click on the 'Cancel' button to cancel the change and be returned from the Home page
- If you do not have your certificate number, our contact information is below. Please provide your name and email address when contacting us  
Email: [cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com)  
Phone: 1-833-496-0546

**Email Address** (This is your user ID)

**Last Four Digits of Your Social Security Number (xxx-xx-####)**

**Your Birthdate (MM/DD/YYYY)**


**CAPTCHA Verification**

 (CAPTCHA verification value)

### Change Your Email ([login](#) required):

1. Click on the 'Change your email' link located under the 'View Certificate' button


Help Contact Us Logout



A **Sammons** Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

Welcome <Your Name>



[Change your password](#)

2. When the following screen appears, do the following:

- a. Type in your current email address
- b. Type in your new email address
- c. Click on the 'Change Email' button

The screenshot shows the 'Change Email' form on the Midland National website. The page header includes the Midland National logo and navigation links: Home, About Us, Certificate Information, Client Services, Tax Information, and Company Financials. The form contains the following elements:

- Change Email** heading
- Instructions: Provide your updated email information within the fields below and click on the 'Change Email' button below to submit your changes.
- Update details: This update will perform the following:
  - Change the email address on file as part of your participant information
  - Change your username required for accessing your information on this website
- Cancel option: Click on the 'Cancel' button to cancel the change and be returned to the Home page.
- Current Email** field: A text input field containing 'name@domain.com'.
- New Email** field: A text input field containing 'name@domain.com'.
- Change Email** button: A blue button with white text, highlighted with a red box.
- Cancel** button: A yellow button with black text.

3. The following screen is displayed

The screenshot shows the 'Email Changed' confirmation message on the Midland National website. The page header includes the Midland National logo and navigation links: Home, About Us, Certificate Information, Client Services, Tax Information, and Company Financials. The message content is as follows:

**Email Changed**


Your email has been successfully changed to 'hmunster23@gmail.com'. The next time you log in, you will need to use the new email address. Click [here](#) to return to the Midland National Pension Home Page.

The word 'here' in the message is highlighted with a red box.

4. Click on the word 'here' to return to the home page

5. To cancel changing your email and be returned to the Home page, click on the 'Cancel' button

Help Contact Us Logout



Home About Us Certificate Information Client Services Tax Information Company Financials

### Change Email

- Provide your updated email information within the fields below and click on the 'Change Email' button below to submit your changes
- This update will perform the following:
  - Change the email address on file as part of your participant information
  - Change your username required for accessing your information on this website
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

**Current Email**


**New Email**

[Change Email](#) [Cancel](#)

**Change Your Password ([login](#) required):**


6. Click on the 'Change your password' link located under the 'View Certificate' button

Help Contact Us Logout



Home About Us Certificate Information Client Services Tax Information Company Financials

Welcome <Your Name>



[View Certificate](#)  
[Change your password](#)  
[Change your email](#)

7. When the following screen appears, do the following:

- a. Type in your old password
- b. Type in your new password
- c. Re-enter your new password
- d. Click on the 'Change Password' button

The screenshot shows the 'Change Password' form on the Midland National website. At the top right, there are links for 'Help', 'Contact Us', and 'Logout'. The Midland National logo is on the left, with the tagline 'A Sammons Financial Company'. Below the logo is a navigation bar with links: 'Home', 'About Us', 'Certificate Information', 'Client Services', 'Tax Information', and 'Company Financials'. The main content area is titled 'Change Password' and contains the following instructions:

- Provide your updated password information within the fields below and click on the 'Change Password' button below to submit your changes
- Your new password must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,(),.
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Below the instructions are three input fields: 'Current Password' (containing 'current password'), 'New Password' (containing 'new password'), and 'Re-enter New Password' (containing 're-enter new password'). At the bottom, there are two buttons: 'Change Password' (highlighted with a red box) and 'Cancel'.

8. The following screen is displayed

The screenshot shows the 'Password Changed' confirmation message on the Midland National website. At the top right, there are links for 'Help', 'Contact Us', and 'Logout'. The Midland National logo is on the left, with the tagline 'A Sammons Financial Company'. Below the logo is a navigation bar with links: 'Home', 'About Us', 'Certificate Information', 'Client Services', 'Tax Information', and 'Company Financials'. The main content area is titled 'Password Changed' and contains the following message:

Your password has been successfully changed. Click [here](#) to return to the Pension Home Page.

The word 'here' is highlighted with a red box, indicating it is a clickable link.

9. Click on the word 'here' to return to the Home page

10. To cancel changing your password and be returned to the Home page, click on the 'Cancel' button

Help Contact Us Logout

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### Change Password

- Provide your updated password information within the fields below and click on the 'Change Password' button below to submit your changes
- Your new password must meet the following requirements:
  - Password must be a minimum of 8 characters in length.
  - Password must contain at least 1 lowercase letter(s).
  - Password must contain at least 1 uppercase letter(s).
  - Password must contain at least 1 digit(s).
  - Only the following special characters are allowed: @,!,\$,\*,(),
  - Password must not contain any part of your username (ex. if username is 'Smith@domain.com' then password cannot contain 'smith' or 'domain')
  - Password must not contain your first or last name.
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

**Current Password**

**New Password** (See above for requirements)

**Re-enter New Password**

Change Password Cancel

**View Additional Certificates ([login](#) required):**

**NOTE:** You will only be required to authorize additional certificates once. Once you have completed the authorization process, all available Midland pension certificates will be available for you to view and make changes.

1. Click on the 'Client Services' link on the top navigation bar

Help Contact Us

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Home About Us Certificate Information Client Services Tax Information Company Financials



2. The following screen appears

The screenshot shows the Midland National website header with the logo and navigation menu. The main content area is titled "Available Services:" and lists several options: Address Change, Phone Number Change, Direct Deposit Change, Beneficiary Change, Name Change, Withholding Change, Taxpayer Identification Number Change, Certificate Request, and Other Change. Below this is a section titled "Do You Have Additional Certificates With Us?" with a red box around the link "View Additional Certificates". At the bottom, there is a link to download a form.

Help Contact Us Logout

MIDLAND NATIONAL  
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### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?

- [View Additional Certificates](#)

Download our [Client Services](#) form.

3. Click on the 'View Additional Certificates' link

4. The following screen appears

The screenshot shows the "Authorize Additional Certificate" form. It includes instructions for users to enter their certificate number and click the "Authorize Certificate" button. A red box highlights the "Authorize Certificate" button.

Help Contact Us Logout

MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

### Authorize Additional Certificate

- If you have an additional certificate with Midland National, enter the additional certificate number and click on the 'Authorize Certificate' button below
- Please note that you do not need to authorize the certificate you used to register your account with us

Certificate Number

Authorize Certificate Cancel

5. Type in the appropriate certificate number and click on the 'Authorize Certificate' button

6. The following screen appears

The screenshot shows a confirmation message stating that the certificate "222222" has been successfully authorized for the account. A red box highlights the word "here" in the message.

Help Contact Us Logout

MIDLAND NATIONAL  
A Sammons Financial Company

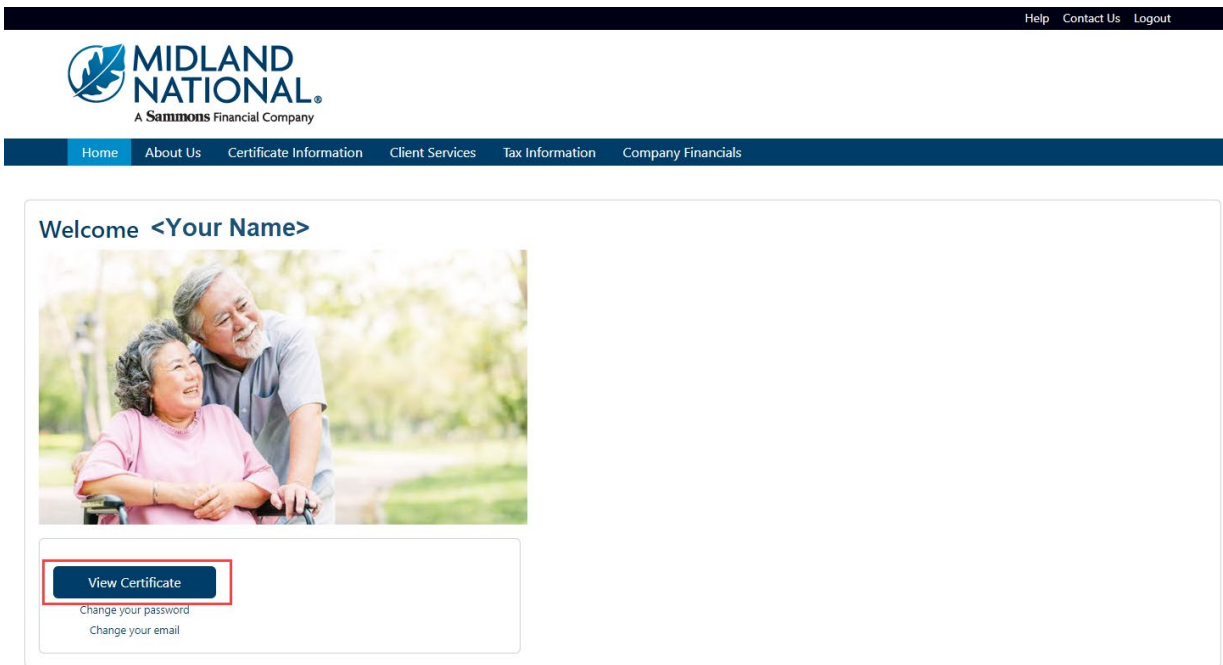
Home About Us Certificate Information Client Services Tax Information Company Financials

### Certificate Authorized

Certificate "222222" has been successfully authorized for your account. Click [here](#) to return to the Midland National Pension home page.

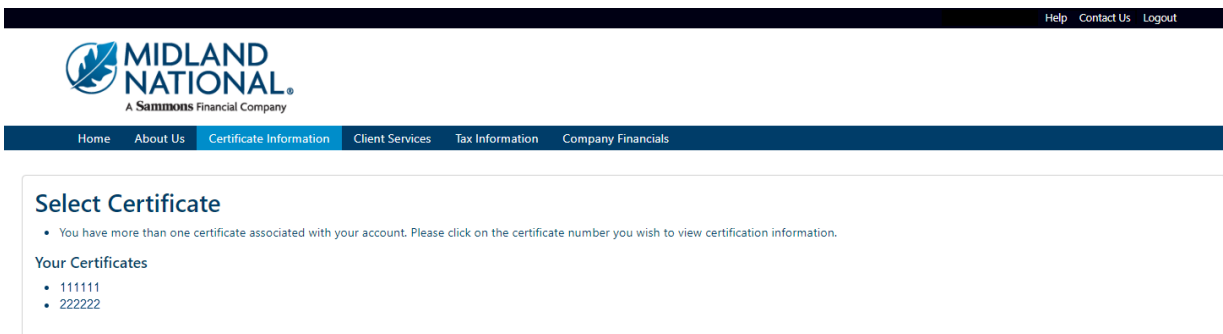
7. Click on the word 'here' to return to the Home page

8. The following screen will be displayed:



9. Click on the 'View Certificate' button

10. The following screen appears (under Certificate Information)



11. Click on the certificate that you wish to view

12. The following screen will be displayed

The screenshot displays the Midland National website interface. At the top right, there are links for "Help", "Contact Us", and "Logout". The Midland National logo is on the left, with the tagline "A Sammons Financial Company". A navigation bar below the logo contains links for "Home", "About Us", "Certificate Information", "Client Services", "Tax Information", and "Company Financials".

A "Print" button is located above the "Participant Information" section. The participant information is presented in a table-like format:

Participant Name: Herman Munster		Phone Number: [edit icon]
Address: 1313 Mockingbird Lane		
City: Mockingbird Heights	State: WA	Zip Code: 11111
Email: hmunster@gmail.com	Date of Birth: 01/01/1793	

A "Change Address" button with an edit icon is positioned to the right of the participant information.

The "Certificate Information" section is also in a table format:

Certificate Number: 111111	Certificate Type: Single Life	Status: ACTIVE
Normal Retirement Date:	Early Retirement Date:	Disbursement Status: Deferred
(Projected) Payment Amount*: \$500.00	% Non-Taxable:	
Required Commencement Date:	COLA Amount: \$0.00	COLA Percentage: 0.00%

\*Amount is based upon the Normal Retirement Date.

The "Earnings Information" section is also in a table format:

Certificate Number: 111111	Frequency: Monthly	Disbursement Start Date: 10/01/2033
Last Disbursement Date:	Next Disbursement Date:	LTD Gross Disbursement: \$0.00

A second "Print" button is located below the earnings information.

**NOTE:** If you would like to make changes to a particular certificate, you will need to select which certificate you would like to change.

13. Click on the Client Services link on the top navigation bar

This screenshot shows the Midland National website with the "Client Services" link in the top navigation bar highlighted with a red box. The navigation bar includes "Home", "About Us", "Certificate Information", "Client Services", "Tax Information", and "Company Financials".

14. The following screen appears

The screenshot displays the "Select Certificate" screen on the Midland National website. The navigation bar is the same as in the previous screenshot, with "Client Services" highlighted. The main content area has the heading "Select Certificate" and a bullet point: "You have more than one certificate associated with your account. Please click on the certificate number to view available client services."

Below this, there is a section titled "Your Certificates" with a list of certificate numbers:

- 111111
- 222222

15. Click on the certificate that you wish to change

16. The following screen appears

The screenshot shows the Midland National website header with the logo and navigation menu. The main content area is titled 'Available Services:' and lists several links: Address Change, Phone Number Change, Direct Deposit Change, Beneficiary Change, Name Change, Withholding Change, Taxpayer Identification Number Change, Certificate Request, and Other Change. Below this is a section titled 'Do You Have Additional Certificates With Us?' with a link to 'View Additional Certificates'. At the bottom, there is a link to download a 'Client Services' form.

17. Click on the appropriate link under the 'Available Services' section to make changes to the selected policy

18. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

The screenshot shows the 'Authorize Additional Certificate' form. It includes a title, two bullet points of instructions, a text input field for the 'Certificate Number', and two buttons: 'Authorize Certificate' and 'Cancel'. The 'Cancel' button is highlighted with a red box.

**Make Changes to Certificate Information ([login](#) required):**

Information about making changes:

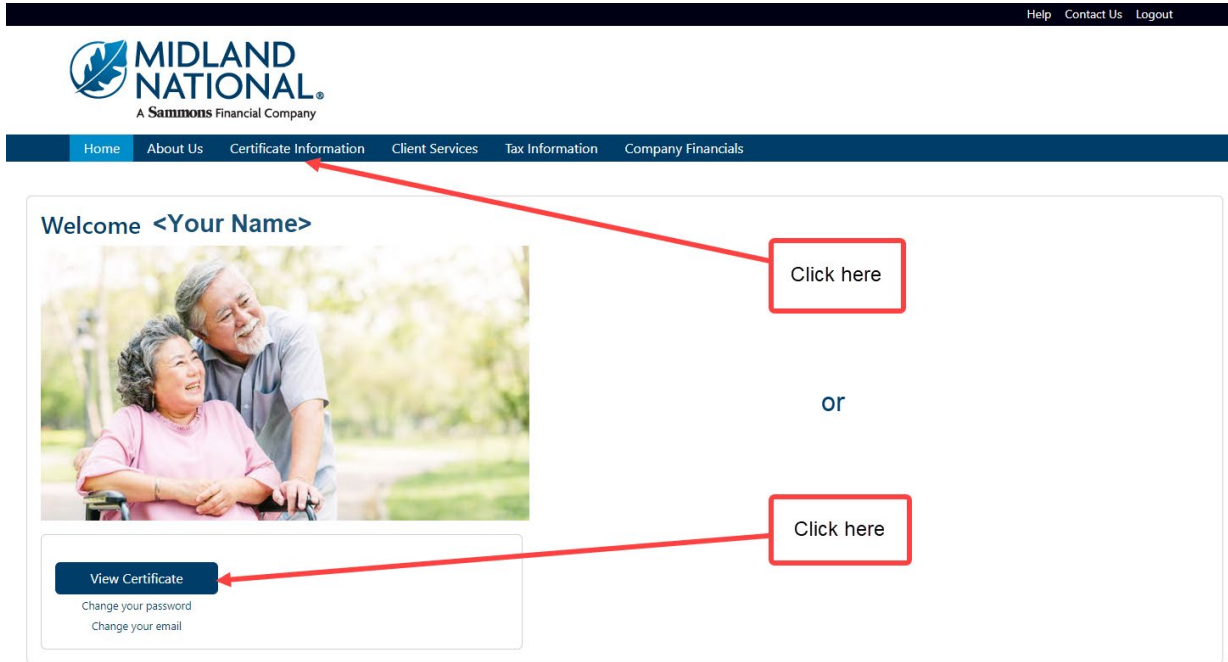
- You can make multiple types of changes (e.g. address change, email, and phone number change) during a single session
- Upon submission of your changes, you will receive an email notification confirming your changes in addition to the confirmation displayed on the screen. Examples are available in [Appendix B](#) of this document.
- Please allow 2 business days for processing of changes as we may require some additional information or documentation from you (we will contact you if this is necessary)
- If you have multiple certificates with us, you will need to submit a change for each certificate
- You cannot make another change of the same type (e.g. address change) on the same certificate until we have completed processing of the change you have already submitted. A message will appear on the screen indicating you have a pending request. Examples are available in [Appendix C](#) of this document.

There are two ways to make changes to your information:

- Certificate Information Screen (Address, Phone, Bank Information, and Beneficiary changes only)
- Client Services Screen

### **Certificate Information**

1. Click on the 'View Certificate' button on the Home page or click on the Certificate Information link on the top navigation bar



2. The following screen will be displayed

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**MIDLAND NATIONAL**  
A Sammons Financial Company

Home About Us **Certificate Information** Client Services Tax Information Company Financials

Print

Participant Information Change Address

Participant Name: Herman Munster Phone Number:

Address: 1313 Mockingbird Lane

City: Mockingbird Heights State: WA Zip Code: 11111

Email: hmunster@gmail.com Date of Birth: 01/01/1793

Certificate Information

Certificate Number: 111111	Certificate Type: Single Life	Status: ACTIVE
Normal Retirement Date:	Early Retirement Date:	Disbursement Status: Deferred
(Projected) Payment Amount*: \$500.00	% Non-Taxable:	
Required Commencement Date:	COLA Amount: \$0.00	COLA Percentage: 0.00%

\*Amount is based upon the Normal Retirement Date.

Earnings Information

Certificate Number: 111111	Frequency: Monthly	Disbursement Start Date: 10/01/2033
Last Disbursement Date:	Next Disbursement Date:	LTD Gross Disbursement: \$0.00

Print

**Change Address:**

1. Click on the 'Change Address' button in the upper right corner of the Participant Information section

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Print

Participant Information Change Address

Participant Name: Herman Munster Phone Number:

Address: 1313 Mockingbird Lane

City: Mockingbird Heights State: WA Zip Code: 11111

Email: hmunster@gmail.com Date of Birth: 01/01/1793

Certificate Information

Certificate Number: 111111	Certificate Type: Single Life	Status: ACTIVE
Normal Retirement Date:	Early Retirement Date:	Disbursement Status: Deferred
(Projected) Payment Amount*: \$500.00	% Non-Taxable:	
Required Commencement Date:	COLA Amount: \$0.00	COLA Percentage: 0.00%

\*Amount is based upon the Normal Retirement Date.

Earnings Information

Certificate Number: 111111	Frequency: Monthly	Disbursement Start Date: 10/01/2033
Last Disbursement Date:	Next Disbursement Date:	LTD Gross Disbursement: \$0.00

Print

## 2. The following screen appears

### Change Address

- Provide your updated address information within the fields below and click on the 'Change Address' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Address Line 1
  - City
  - State
  - Zip
- For foreign address changes, click on the checkbox labeled 'Foreign Address' below and submit your change(s) in the appropriate address lines. Street addresses should be on Line 1 and remaining information on Line 2.
- If you are changing your residence state and have elected to withhold state taxes, please be aware that this update will not automatically change your withholding state. You will need to complete a [Withholding Change](#) request if you wish to make that change.
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned from the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
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**Foreign Address**

**Address Line 1**  
1313 Mockingbird Lane

**Address Line 2**

**City** Mockingbird Heights      **State** Washington      **Zip** 11111

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

**Change Address**   **Reset**   **Cancel**

Your current address information is displayed on the screen for reference.

Type in the appropriate changes in the appropriate fields. The 'State' field is a dropdown list containing an available list of states that can be selected by scrolling through the list and clicking on the appropriate state.

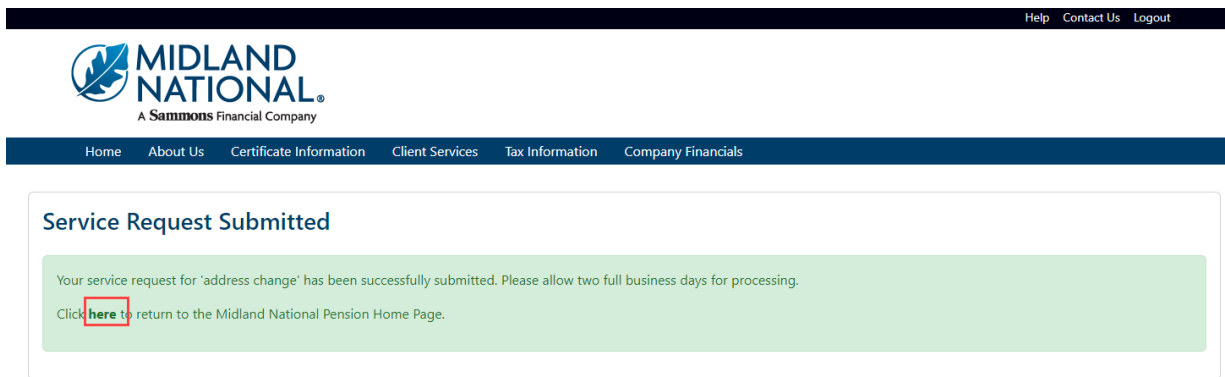
The following fields are required:

- Address Line 1
- City\*
- State\*
- Zip\*

\* These required fields are for non-foreign addresses only

## 3. Once you are finished updating your address information, click on the 'Change Address' button

4. The following screen will be displayed



5. Click on the word 'here' to return to the Home page

6. If you are changing to a 'foreign address', click on the checkbox to the left of the 'Foreign Address' label (displayed in red)

The screenshot shows the "Change Address" form. At the top, there are instructions and a list of required fields: Address Line 1, City, State, and Zip. Below the instructions, there are two input fields: "Certificate Number" (111111) and "Participant Name" (Herman Munster). A checkbox labeled "Foreign Address" is checked. Below this, there are input fields for "Address Line 1" (1313 Mockingbird Lane) and "Address Line 2". Below these are three input fields: "City", "State" (a dropdown menu), and "Zip". At the bottom, there are three buttons: "Change Address", "Reset", and "Cancel". A disclaimer for CA Residents is also visible.

This will make the City, State, and Zip fields display in a gray color and only allow changes to be made in the Address Line 1 and Address Line 2 fields.

7. Click on the 'Change Address' button



8. The following screen will be displayed

The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, a green box contains the following text: "Service Request Submitted" followed by "Your service request for 'direct deposit change' has been successfully submitted. Please allow two full business days for processing." Below this, it says "Click **here** to return to the Midland National Pension Home Page." The word "here" is highlighted with a red box.

9. Click on the word 'here' to return to the Home page

10. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

The screenshot shows the "Change Address" form. At the top, it says "Change Address" and lists instructions. Below the instructions, there are two input fields: "Certificate Number" with the value "111111" and "Participant Name" with the value "Herman Munster". Below these is a checkbox labeled "Foreign Address" which is currently unchecked. Underneath, there are three input fields: "Address Line 1" with the value "1313 Mockingbird Lane", "Address Line 2" (empty), and "City" with the value "Mockingbird Heights". To the right of the "City" field is a "State" dropdown menu with "Washington" selected, and a "Zip" field with the value "11111". At the bottom of the form, there are three buttons: "Change Address", "Reset" (highlighted with a red box), and "Cancel".

11. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Address

- Provide your updated address information within the fields below and click on the 'Change Address' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Address Line 1
  - City
  - State
  - Zip
- For foreign address changes, click on the checkbox labeled 'Foreign Address' below and submit your change(s) in the appropriate address lines. Street addresses should be on Line 1 and remaining information on Line 2.
- If you are changing your residence state and have elected to withhold state taxes, please be aware that this update will not automatically change your withholding state. You will need to complete a [Withholding Change](#) request if you wish to make that change.
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned from the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

Foreign Address

Address Line 1  
1313 Mockingbird Lane

Address Line 2

City: Mockingbird Heights      State: Washington      Zip: 11111


CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Address](#)   [Reset](#)   [Cancel](#)

### Change Phone Number:

1. Click on the 'pencil' icon to the right of the 'Phone' field within the Participant Information section

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[Print](#)

#### Participant Information

Participant Name: Herman Munster		Phone Number: 
Address: 1313 Mockingbird Lane		
City: Mockingbird Heights	State: WA	Zip Code: 11111
Email: hmunster@gmail.com	Date of Birth: 01/01/1793	

#### Certificate Information

Certificate Number: 111111	Certificate Type: Single Life	Status: ACTIVE
Normal Retirement Date:	Early Retirement Date:	Disbursement Status: Deferred
(Projected) Payment Amount*: \$500.00	% Non-Taxable:	
Required Commencement Date:	COLA Amount: \$0.00	COLA Percentage: 0.00%

\*Amount is based upon the Normal Retirement Date.

#### Earnings Information

Certificate Number: 111111	Frequency: Monthly	Disbursement Start Date: 10/01/2033
Last Disbursement Date:	Next Disbursement Date:	LTD Gross Disbursement: \$0.00

[Print](#)

2. The following screen appears

**Change Phone Number**

- Provide your updated phone information within the field below and click on the 'Change Phone' button below to submit your changes
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

**Certificate Number** 111111 **Participant Name** Herman Munster

**Phone Number**

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Phone](#) [Reset](#) [Cancel](#)

Type in the appropriate changes in the phone number field.

3. Once you are finished updating your phone number, click on the 'Change Phone' button

4. The following screen will be displayed

here to return to the Midland National Pension Home Page.' The word 'here' is highlighted with a red box."/>

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**Service Request Submitted**

Your service request for 'phone number change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

5. Click on the word 'here' to return to the Home page

6. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

**Change Phone Number**

- Provide your updated phone information within the field below and click on the 'Change Phone' button below to submit your changes
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

**Certificate Number** 111111 **Participant Name** Herman Munster

**Phone Number**

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Phone](#) [Reset](#) [Cancel](#)

- If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Phone Number

- Provide your updated phone information within the field below and click on the 'Change Phone' button below to submit your changes
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
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**Phone Number**

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

### Change Bank Information (Direct Deposit):

- Click on the 'Change Bank Information' button in the upper right corner of the Bank Information section

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[Print](#)

#### Participant Information

<b>Participant Name:</b> Herman Munster		<b>Phone Number:</b> <a href="#">Change Address</a>	
<b>Address:</b> 1313 Mockingbird Lane			
<b>City:</b> Mockingbird Heights	<b>State:</b> WA	<b>Zip Code:</b> 11111	
<b>Email:</b> hmunster@gmail.com	<b>Date of Birth:</b> 01/01/1793		

#### Certificate Information

<b>Certificate Number:</b> 111111	<b>Certificate Type:</b> Single Life	<b>Status:</b> ACTIVE
<b>Normal Retirement Date:</b>	<b>Early Retirement Date:</b>	<b>Disbursement Status:</b> In Pay
<b>Payment Amount*:</b> \$500.00	<b>% Non-Taxable:</b>	
<b>Required Commencement Date:</b>	<b>COLA Amount:</b> \$0.00	<b>COLA Percentage:</b> 0.00%

\*Amount is based upon the Normal Retirement Date.

#### Bank Information

<b>Bank Name:</b> Bank of Mockingbird Heights		<b>Bank Account Type:</b> Checking	
<b>Bank Routing Number:</b> 111111111	<b>Bank Account Number:</b> 111111111		

[Change Bank Information](#)

2. The following screen appears

### Change Direct Deposit

- If adding or changing your bank information, provide your updated bank information within the fields below and click on the 'Change Direct Deposit' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Account Type
  - Routing Number (must be 9 digits and start with either a 0, 1, 2, or 3)
  - Account Number (must be a minimum of 4 digits and has a maximum of 17 digits)
- If removing your bank information (e.g. you no longer wish to receive payments via direct deposit), click on the checkbox labeled 'Remove Direct Deposit' (in red) and click on the 'Change Direct Deposit' button below
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

Remove Direct Deposit

**Bank Name**  
Bank of Mockingbird Heights

**Account Type**  
Checking

**Routing Number**  
111111111

**Account Number (current ends in 1111)**

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Direct Deposit](#) [Reset](#) [Cancel](#)

Your current direct deposit information is displayed on the screen for reference.

Type in the appropriate changes in the appropriate fields. The 'State' field is a dropdown list containing an available list of states that can be selected by scrolling through the list and clicking on the appropriate state. The 'Account Type' field is also a dropdown list that allows you to select Checking or Savings.


The following fields are required:

- Account Type
- Routing Number
- Account Number

3. Once you are finished updating your direct deposit information, click on the 'Change Direct Deposit' button

4. The following screen will be displayed

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### Service Request Submitted

Your service request for 'direct deposit change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

5. Click on the word 'here' to return to the Home page

6. If you wish to 'remove' your direct deposit request, click on the checkbox to the left of the 'Remove Direct Deposit' label (displayed in red)

### Change Direct Deposit

- If adding or changing your bank information, provide your updated bank information within the fields below and click on the 'Change Direct Deposit' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Account Type
  - Routing Number (must be 9 digits and start with either a 0, 1, 2, or 3)
  - Account Number (must be a minimum of 4 digits and has a maximum of 17 digits)
- If removing your bank information (e.g. you no longer wish to receive payments via direct deposit), click on the checkbox labeled 'Remove Direct Deposit' (in red) and click on the 'Change Direct Deposit' button below
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

**Remove Direct Deposit**

**Bank Name**  
Bank of Mockingbird Heights

**Account Type**  
Checking

**Routing Number**  
111111111

**Account Number (current ends in 1111)**  
[Redacted]


CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Direct Deposit](#) [Reset](#) [Cancel](#)

This will make the fields for the direct deposit display in a gray color. It will also disable the ability to make changes to any of the fields.

7. Click on the 'Change Direct Deposit' button
8. The following screen will be displayed

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### Service Request Submitted

Your service request for 'direct deposit change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

9. Click on the word 'here' to return to the Home page

10. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

### Change Direct Deposit

- If adding or changing your bank information, provide your updated bank information within the fields below and click on the 'Change Direct Deposit' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Account Type
  - Routing Number (must be 9 digits and start with either a 0, 1, 2, or 3)
  - Account Number (must be a minimum of 4 digits and has a maximum of 17 digits)
- If removing your bank information (e.g. you no longer wish to receive payments via direct deposit), click on the checkbox labeled 'Remove Direct Deposit' (in red) and click on the 'Change Direct Deposit' button below
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

Remove Direct Deposit

**Bank Name**  
Bank of Mockingbird Heights

**Account Type**  
Checking

**Routing Number**  
111111111

**Account Number (current ends in 1111)**

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

11. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Direct Deposit

- If adding or changing your bank information, provide your updated bank information within the fields below and click on the 'Change Direct Deposit' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Account Type
  - Routing Number (must be 9 digits and start with either a 0, 1, 2, or 3)
  - Account Number (must be a minimum of 4 digits and has a maximum of 17 digits)
- If removing your bank information (e.g. you no longer wish to receive payments via direct deposit), click on the checkbox labeled 'Remove Direct Deposit' (in red) and click on the 'Change Direct Deposit' button below
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

Remove Direct Deposit

**Bank Name**  
Bank of Mockingbird Heights

**Account Type**  
Checking

**Routing Number**  
111111111

**Account Number (current ends in 1111)**

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

## Beneficiary Change:

1. Click on the 'Change Beneficiary Information' button in the upper right corner of Beneficiary Information section (the button is displayed in the upper right corner for each beneficiary)



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Print

### Participant Information

<b>Participant Name:</b> Herman Munster			<b>Phone Number:</b>		
<b>Address:</b> 1313 Mockingbird Lane					
<b>City:</b> Mockingbird Heights		<b>State:</b> WA		<b>Zip Code:</b> 11111	
<b>Email:</b> hmunster@gmail.com			<b>Date of Birth:</b> 01/01/1793		

**Change Address**

### Certificate Information

<b>Certificate Number:</b> 111111	<b>Certificate Type:</b> Single Life	<b>Status:</b> ACTIVE
<b>Normal Retirement Date:</b>	<b>Early Retirement Date:</b>	<b>Disbursement Status:</b> In Pay
<b>Payment Amount*:</b> \$500.00	<b>% Non-Taxable:</b>	
<b>Required Commencement Date:</b>	<b>COLA Amount:</b> \$0.00	<b>COLA Percentage:</b> 0.00%

\*Amount is based upon the Normal Retirement Date.

### Bank Information

<b>Bank Name:</b> Bank of Mockingbird Heights		<b>Bank Account Type:</b> Checking	
<b>Bank Routing Number:</b> 111111111		<b>Bank Account Number:</b> 111111111	

**Change Bank Information**

### Earnings Information

<b>Certificate Number:</b> 111111	<b>Frequency:</b> Monthly	<b>Disbursement Start Date:</b>
<b>Last Disbursement Date:</b>	<b>Next Disbursement Date:</b>	<b>LTD Gross Disbursement:</b>

Last Disbursement		Year to Date	
<b>Gross Disbursement:</b>		<b>Gross Disbursement:</b>	
<b>Federal W/H:</b> \$0.00		<b>Federal W/H:</b> \$0.00	
<b>State Tax W/H:</b>		<b>State Tax W/H:</b>	
<b>Net Disbursement:</b>		<b>Net Disbursement:</b>	

### Beneficiary Information

<b>Beneficiary 1 Name:</b> Eddie Munster				<b>Phone Number:</b>	
<b>Address:</b> 1313 Mockingbird Lane					
<b>City:</b> Mockingbird Heights		<b>State:</b> Washington		<b>Zip Code:</b> 11111	
<b>Relationship:</b> Child	<b>Split:</b> 50.00%	<b>Irrevocable:</b>	<b>Per Stirpes:</b>		

<b>Beneficiary 2 Name:</b>				<b>Phone Number:</b>	
<b>Address:</b> 1313 Mockingbird Lane					
<b>City:</b> Mockingbird Heights		<b>State:</b> Washington		<b>Zip Code:</b> 11111	
<b>Relationship:</b> Other	<b>Split:</b> 50.00%	<b>Irrevocable:</b>	<b>Per Stirpes:</b>		

**Change Beneficiary Information**

**Change Beneficiary Information**

Print



## 2. The following screen appears

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

**Add A New Beneficiary**

**Beneficiary #1**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00
<b>Address 1</b>	<b>Address 2</b>		<b>City</b>	<b>State</b>	<b>Zip</b>	
1313 Mockingbird Lane			Mockingbird Heights	Washington	11111	

**Beneficiary #2**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Marilyn		Munster	Other	06/01/1959	XXX-XX-3333	50.00
<b>Address 1</b>	<b>Address 2</b>		<b>City</b>	<b>State</b>	<b>Zip</b>	
1313 Mockingbird Lane			Mockingbird Heights	Washington	11111	

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/ Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/ Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/ Joint Owner has not obtained his/her spouse's signature. Further, the Owner/ Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/ Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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**Submit Changes** **Reset** **Cancel**

If available, your current beneficiary information will be displayed on the screen for reference.

Three options are available to you:

1. Change Existing Beneficiary Information
2. Add a New Beneficiary
3. Remove an Existing Beneficiary

### **Change Existing Beneficiary Information:**

- a. Type in the appropriate changes in the appropriate fields. The 'State' field is a dropdown list containing an available list of states that can be selected by scrolling through the list and clicking on the appropriate state. The 'Relation' field is also a dropdown list that allows you to select the appropriate relationship of the beneficiary.

The following fields are required:

- Last Name
- Relationship

b. Once you are finished updating your beneficiary information, click on the 'Submit Changes' button

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

[Add A New Beneficiary](#)

**Beneficiary #1**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00

<b>Address 1</b>	<b>Address 2</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
1313 Mockingbird Lane		Mockingbird Heights	Washington	11111

**Beneficiary #2**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Marilyn		Munster	Other	06/01/1959	XXX-XX-3333	50.00

<b>Address 1</b>	<b>Address 2</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
1313 Mockingbird Lane		Mockingbird Heights	Washington	11111


**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/Joint Owner has not obtained his/her spouse's signature. Further, the Owner/Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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[Submit Changes](#) [Reset](#) [Cancel](#)

c. The following screen will be displayed

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### Service Request Submitted

Your service request for 'beneficiary change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

d. Click on the word 'here' to return to the Home page

## Add a New Beneficiary:

a. Click on the 'Add New Beneficiary' button

**NOTE:** Not all pension plans allow a beneficiary provision. Please refer to your certificate information to determine if a beneficiary can be added.

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

**Add A New Beneficiary**

**Remove Beneficiary**

**Beneficiary #1**

First Name	MI	Last Name	Relation	DOB	SSN	% Split
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00

Address 1: 1313 Mockingbird Lane      Address 2:      City: Mockingbird Heights      State: Washington      Zip: 11111

**Beneficiary #2**

**Remove Beneficiary**

First Name	MI	Last Name	Relation	DOB	SSN	% Split
Marilyn		Munster	Other	06/01/1959	XXX-XX-3333	50.00

Address 1: 1313 Mockingbird Lane      Address 2:      City: Mockingbird Heights      State: Washington      Zip: 11111

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/Joint Owner has not obtained his/her spouse's signature. Further, the Owner/Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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**Submit Changes**   **Reset**   **Cancel**

b. The following screen appears

**Beneficiary #3**

**Remove Beneficiary**

First Name	MI	Last Name	Relation	DOB	SSN	% Split
			<EMPTY>			

Address 1:      Address 2:      City:      State: <EMPTY>      Zip:     

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/Joint Owner has not obtained his/her spouse's signature. Further, the Owner/Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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**Submit Changes**   **Reset**   **Cancel**

A new blank beneficiary section will be displayed (if you have existing beneficiaries) or a blank beneficiary section will display (if no previous beneficiaries). The beneficiary # displayed will be dependent upon the number of beneficiaries currently indicated (e.g. therefore the number displayed will vary).

- c. Type in the appropriate changes in the appropriate fields. The 'State' field is a dropdown list containing an available list of states that can be selected by scrolling through the list and clicking on the appropriate state. The 'Relation' field is also a dropdown list that allows you to select the appropriate relationship of the beneficiary.

The following fields are required:

- Last Name
- Relationship

- d. Once you are finished updating your beneficiary information, click on the 'Submit Changes' button

**Beneficiary #3**

Remove Beneficiary

First Name	MI	Last Name	Relation	DOB	SSN	% Split
<input type="text"/>	<input type="text"/>	<input type="text"/>	<EMPTY> ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address 1	Address 2	City	State	Zip		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<EMPTY> ▾	<input type="text"/>		

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/Joint Owner has not obtained his/her spouse's signature. Further, the Owner/Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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- e. The following screen will be displayed

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Home About Us Certificate Information Client Services Tax Information Company Financials

**Service Request Submitted**

Your service request for 'beneficiary change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

- f. Click on the word 'here' to return to the Home page

## Remove an Existing Beneficiary:

- a. Click on the checkbox to the left of the 'Remove Beneficiary' label (displayed in red)

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

[Add A New Beneficiary](#)

**Beneficiary #1**

**Remove Beneficiary**

First Name	MI	Last Name	Relation	DOB	SSN	% Split
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00

Address 1	Address 2	City	State	Zip
1313 Mockingbird Lane		Mockingbird Heights	Washington	11111

This will make the fields for that beneficiary display in a gray color. It will also disable the ability to make changes to any of the fields.

- b. Click on the 'Submit Changes' button

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

[Add A New Beneficiary](#)

**Beneficiary #1**

**Remove Beneficiary**

First Name	MI	Last Name	Relation	DOB	SSN	% Split
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00

Address 1	Address 2	City	State	Zip
1313 Mockingbird Lane		Mockingbird Heights	Washington	11111

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/JOint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/JOint Owner understands and agrees the Company may presume that no such interest exists if the Owner/JOint Owner has not obtained his/her spouse's signature. Further, the Owner/JOint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/JOint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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[Submit Changes](#) [Reset](#) [Cancel](#)

c. The following screen will be displayed

The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, a green box contains the following text: "Service Request Submitted". Below this, a light green box contains the message: "Your service request for 'beneficiary change' has been successfully submitted. Please allow two full business days for processing. Click [here](#) to return to the Midland National Pension Home Page." The word "here" is highlighted with a red box.

d. Click on the word 'here' to return to the Home page

4. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

The screenshot shows the "Change Beneficiaries" form. At the top, there are fields for "Certificate Number" (111111) and "Participant Name" (Herman Munster). Below these is a blue button labeled "Add A New Beneficiary". The form lists two beneficiaries:

- Beneficiary #1:** Eddie Munster, Child, DOB 01/01/1964, SSN XXX-XX-2222, % Split 50.00. Address 1: 1313 Mockingbird Lane, City: Mockingbird Heights, State: Washington, Zip: 11111.
- Beneficiary #2:** Marilyn Munster, Other, DOB 06/01/1959, SSN XXX-XX-3333, % Split 50.00. Address 1: 1313 Mockingbird Lane, City: Mockingbird Heights, State: Washington, Zip: 11111.

Each beneficiary has a "Remove Beneficiary" checkbox. At the bottom of the form, there are three buttons: "Submit Changes", "Reset" (highlighted with a red box), and "Cancel".

**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/Joint Owner has not obtained his/her spouse's signature. Further, the Owner/Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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5. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Beneficiaries

- If making changes, provide your updated beneficiary information within the fields below and click on the 'Submit Changes' button below
- If adding beneficiaries, click on the 'Add A New Beneficiary' button below, input your information, and click on the 'Submit Changes' button below
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Relationship
- If removing beneficiaries, click on the checkbox labeled 'Remove Beneficiary' (in red) and click on the 'Submit Changes' button below
- If the relationship of the beneficiary is not an individual (e.g. Trust), please input the name information in the last name field only
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name
111111	Herman Munster

**Add A New Beneficiary**

**Beneficiary #1**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Eddie		Munster	Child	01/01/1964	XXX-XX-2222	50.00
<b>Address 1</b>	<b>Address 2</b>		<b>City</b>	<b>State</b>	<b>Zip</b>	
1313 Mockingbird Lane			Mockingbird Heights	Washington	11111	

**Beneficiary #2**

**Remove Beneficiary**

<b>First Name</b>	<b>MI</b>	<b>Last Name</b>	<b>Relation</b>	<b>DOB</b>	<b>SSN</b>	<b>% Split</b>
Marilyn		Munster	Other	06/01/1959	XXX-XX-3333	50.00
<b>Address 1</b>	<b>Address 2</b>		<b>City</b>	<b>State</b>	<b>Zip</b>	
1313 Mockingbird Lane			Mockingbird Heights	Washington	11111	

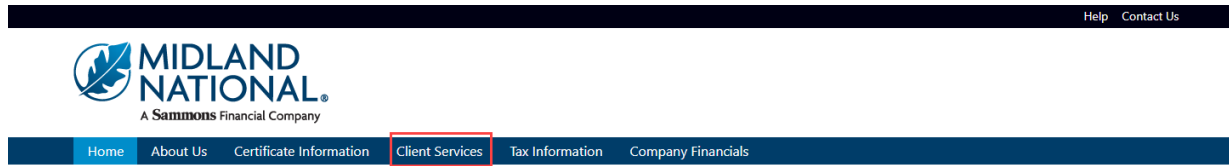
**Community Property:** If this transaction is subject to a community property or civil union interest, we strongly recommend the Owner/ Joint Owner obtain his/her spouse's signature to document his/her consent to this transaction. The Owner/ Joint Owner understands and agrees the Company may presume that no such interest exists if the Owner/ Joint Owner has not obtained his/her spouse's signature. Further, the Owner/ Joint Owner understands and agrees the Company has no duty to inquire further about any such interest. As a result, the Owner/ Joint Owner agrees to indemnify and hold the Company harmless from any consequences relating to community property or civil union interests and this transaction. Please note that the term "Spouse" includes domestic partner or other partner as permitted by civil union, domestic partnership or similar law. Likewise, the term "civil union" is intended to mean civil union, domestic partnership or other marriage-like arrangement permitted by law.

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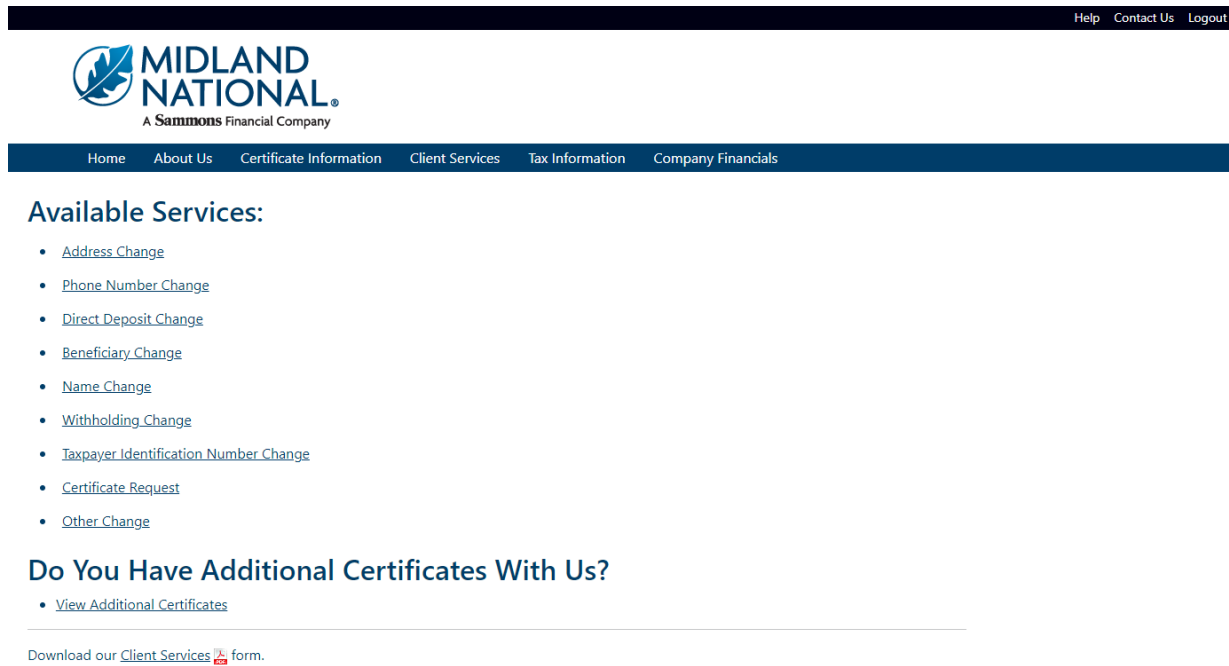
**Submit Changes** **Reset** **Cancel**

## Client Services

1. Click on the Client Services link on the top navigation bar



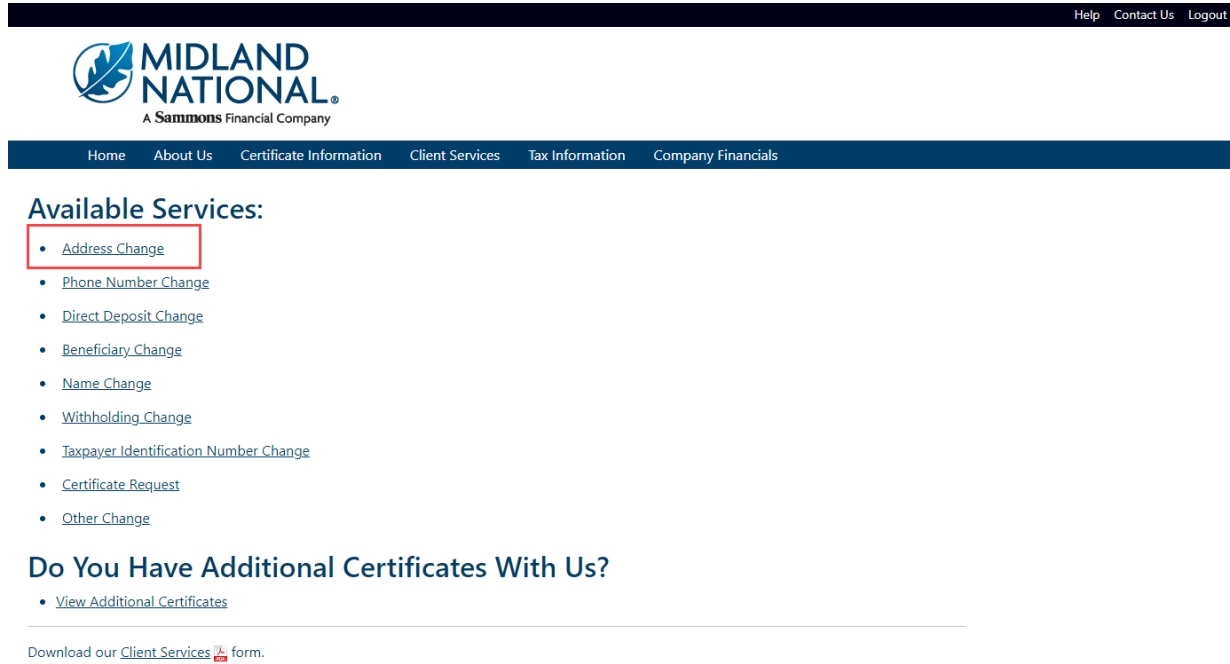
2. The following screen appears





## Address Change:

1. Click on the 'Address Change' link

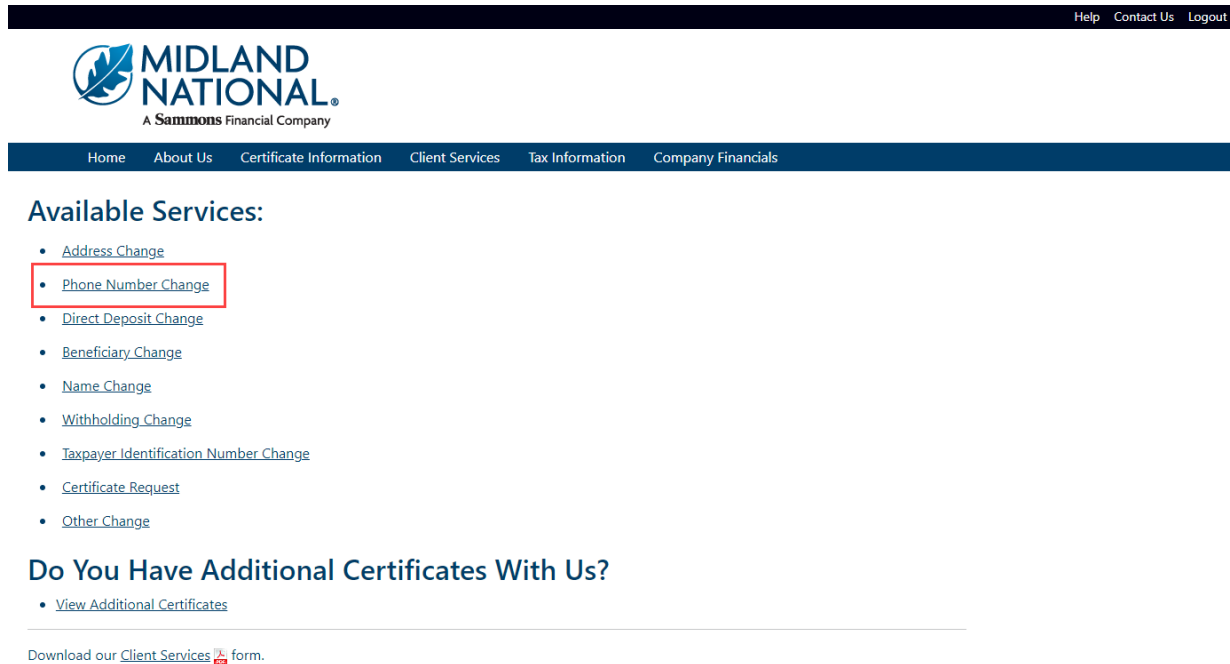


The screenshot shows the Midland National website header with the logo and navigation menu. Below the navigation menu, the 'Available Services' section is displayed, with a list of links. The 'Address Change' link is highlighted with a red box. Below this section, there is a heading 'Do You Have Additional Certificates With Us?' and a link 'View Additional Certificates'. At the bottom, there is a note: 'Download our Client Services form.'

2. Refer to the [Address Change](#) instructions above for further instructions

## Phone Number Change:

1. Click on the 'Phone Number Change' link

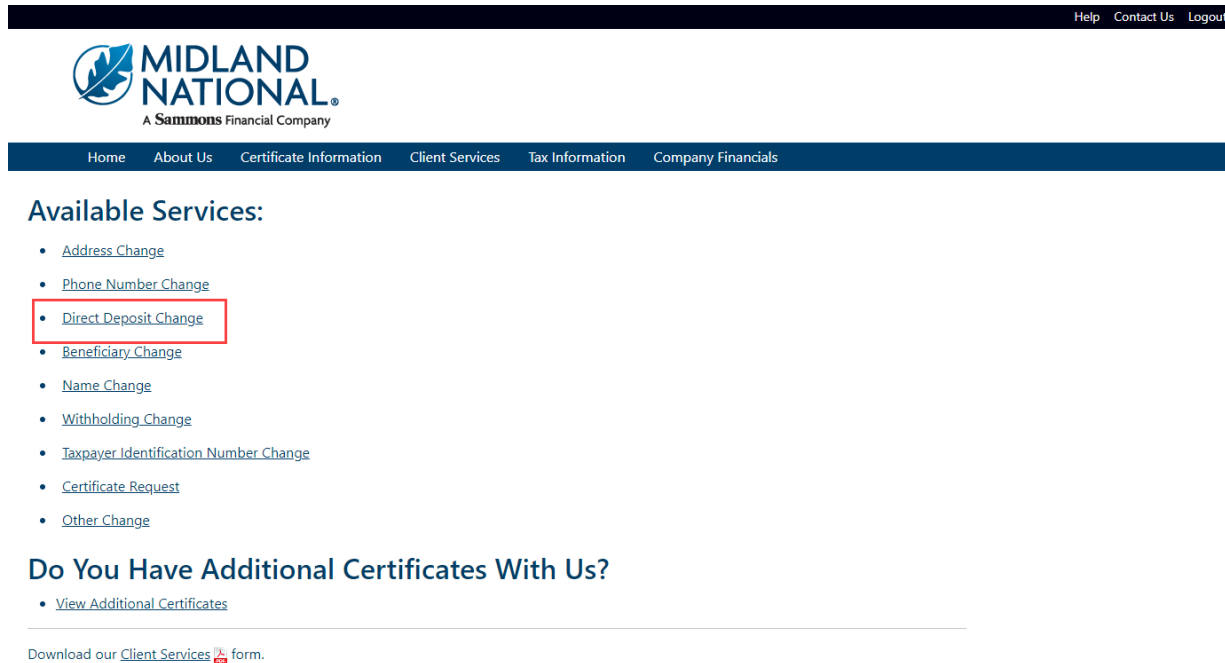


The screenshot shows the Midland National website header with the logo and navigation menu. Below the navigation menu, the 'Available Services' section is displayed, with a list of links. The 'Phone Number Change' link is highlighted with a red box. Below this section, there is a heading 'Do You Have Additional Certificates With Us?' and a link 'View Additional Certificates'. At the bottom, there is a note: 'Download our Client Services form.'

2. Refer to the [Phone Number Change](#) instructions above for further instructions

## Direct Deposit Change:

1. Click on the 'Direct Deposit Change' link



The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, the 'Available Services' section is displayed, listing various services. The 'Direct Deposit Change' link is highlighted with a red box. Below this section, there is a link to 'View Additional Certificates' and a download link for a 'Client Services' form.

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### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?

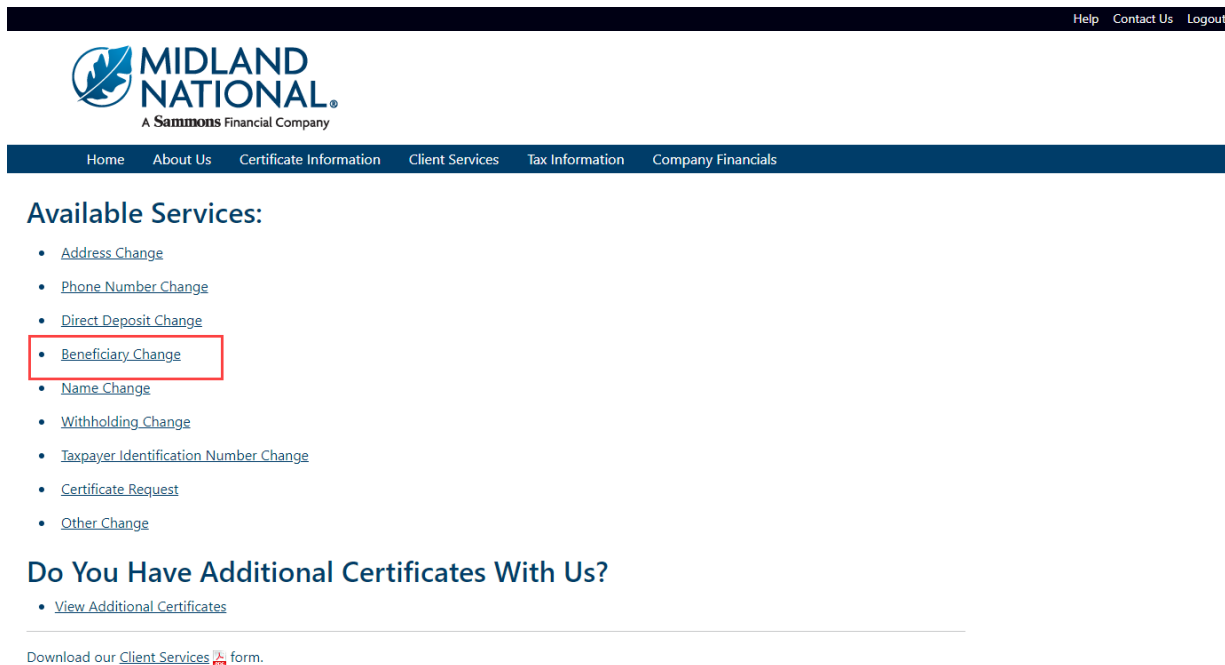
- [View Additional Certificates](#)

Download our [Client Services](#) form.

2. Refer to the [Bank Information \(Direct Deposit\) Change](#) instructions above for further instructions

## Beneficiary Change:

1. Click on the 'Beneficiary Change' link



The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, the 'Available Services' section is displayed, listing various services. The 'Beneficiary Change' link is highlighted with a red box. Below this section, there is a link to 'View Additional Certificates' and a download link for a 'Client Services' form.

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### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?

- [View Additional Certificates](#)

Download our [Client Services](#) form.

2. Refer to the [Beneficiary Change](#) instructions above for further instructions

## Name Change:

1. Click on the 'Name Change' link

The screenshot shows the Midland National website header with the logo and navigation menu. The 'Available Services' section lists several options, with 'Name Change' highlighted by a red box. Below this, there is a section titled 'Do You Have Additional Certificates With Us?' with a link to 'View Additional Certificates'. At the bottom, there is a link to download a 'Client Services' form.

2. The following screen appears

The screenshot shows the 'Change Name' form. It includes instructions, a list of required fields (Last Name and Reason), and input fields for Certificate Number, Current First Name, Middle Initial, Last Name, New First Name, Middle Initial, Last Name, and Reason For Change. The 'Change Name' button is highlighted with a red box.

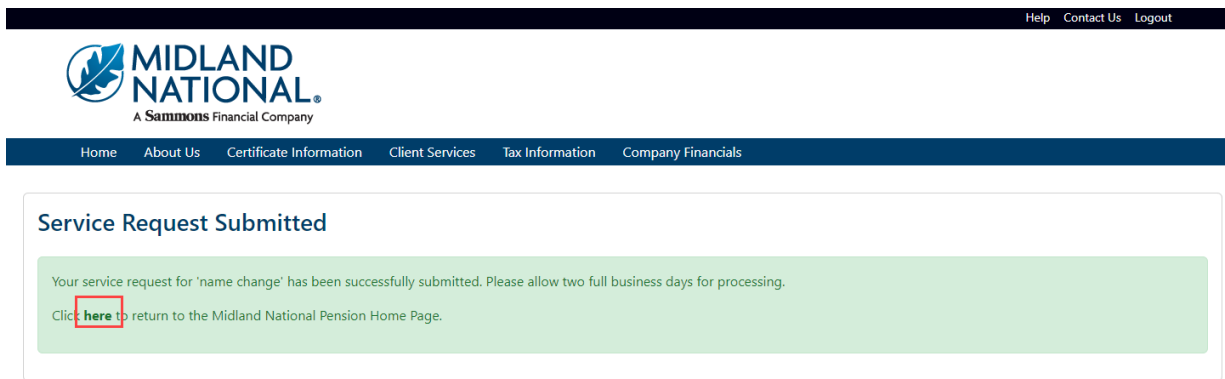
Type in the appropriate changes in the appropriate fields.

The following fields are required:

- Last Name
- Reason For Change

3. Once you are finished updating your name change information, click on the 'Change Name' button

4. The following screen will be displayed



5. Click on the word 'here' to return to the Home page

6. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

### Change Name

- Provide your updated name information within the fields below and click on the 'Change Name' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Reason
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number		
111111		
Current First Name	Middle Initial	Last Name
HERMAN		MUNSTER
New First Name	Middle Initial	Last Name
HERMAN		MUNSTER
Reason For Change		

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

Change Name Reset Cancel

7. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Name

- Provide your updated name information within the fields below and click on the 'Change Name' button below to submit your changes
- The following fields are required to be completed prior to submitting your changes:
  - Last Name
  - Reason
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number		
111111		
Current First Name	Middle Initial	Last Name
HERMAN		MUNSTER
New First Name	Middle Initial	Last Name
HERMAN		MUNSTER
Reason For Change		

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

Change Name Reset Cancel

## Withholding Change:

1. Click on the 'Withholding Change' link

The screenshot shows the Midland National website header with the logo and navigation menu. The 'Available Services' section lists several options, with 'Withholding Change' highlighted by a red box. Below this, there is a section titled 'Do You Have Additional Certificates With Us?' with a link to 'View Additional Certificates'. At the bottom, there is a link to download a 'Client Services' form.

2. The following screen appears

The screenshot shows the 'Change Withholding' form. It includes a title, a list of instructions, and a form with the following fields:

- Certificate Number:** 111111
- Participant Name:** HERMAN MUNSTER
- Current SSN:** XXX-XX-1111

**Federal Withholding (select one):**

- By Amount:** [Empty text box]
- By Percentage:** [Empty text box]

**State Withholding (select one):**

- State:** WASHINGTON (dropdown menu)
- By Amount:** 50.00
- By Percentage:** [Empty text box]

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

Buttons: **Change Withholding** (highlighted with a red box), **Reset**, **Cancel**

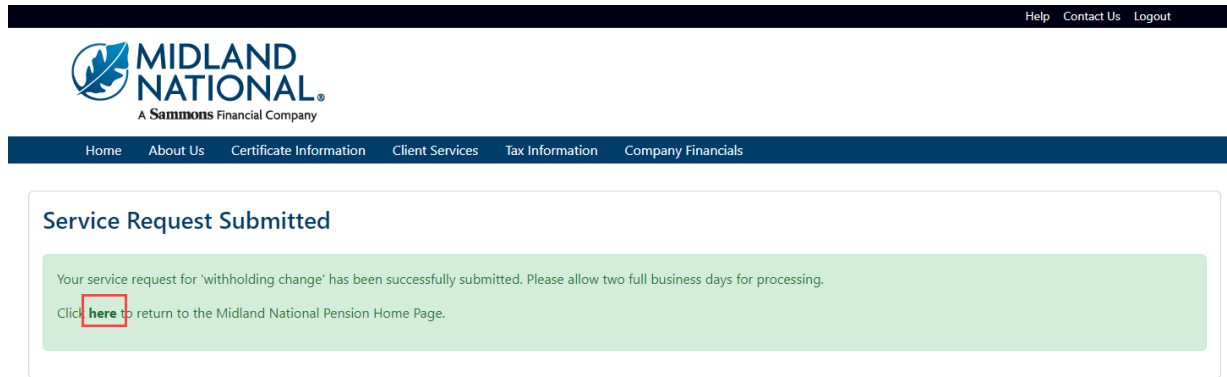
Type in the appropriate changes in the appropriate fields. Either a withholding amount or percentage must be entered but not both. The 'State' field is a dropdown list containing an available list of states that can be selected by scrolling through the list and clicking on the appropriate state.

The following fields are required:

- Either Federal Withholding or State Withholding
- Either Withholding Amount or Percentage (but not both)
- If State Withholding is entered, the State Field is required

3. Once you are finished updating your withholding change information, click on the 'Change Withholding' button

4. The following screen will be displayed



5. Click on the word 'here' to return to the Home page

6. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

The screenshot shows the "Change Withholding" form. At the top, there is a title "Change Withholding" and a list of instructions. Below the instructions, there is a table with three columns: "Certificate Number", "Participant Name", and "Current SSN". The values are "111111", "HERMAN MUNSTER", and "XXX-XX-1111" respectively. Below the table, there are sections for "Federal Withholding (select one):" and "State Withholding (select one):". The "Federal Withholding" section has two options: "By Amount" and "By Percentage". The "State Withholding" section has a "State" dropdown menu set to "WASHINGTON", and two options: "By Amount" and "By Percentage". The "By Amount" field is set to "50.00". At the bottom of the form, there are three buttons: "Change Withholding", "Reset", and "Cancel". The "Reset" button is highlighted with a red box.

7. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Withholding

- Provide your updated withholding information within the fields below and click on the 'Change Withholding' button below to submit your changes
- Either Federal or State Withholding will be required when submitting changes
- You can specify either a dollar amount or a percentage for withholding (but not both)
- For State Withholding, the withholding state is required (NOTE: Not applicable in FL, HI, SD, and TX)
- If you wish to remove your withholding, please input a '0' (zero) in the appropriate field
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page
- If you'd like to complete and submit a W4-P, you can find a copy online at <https://www.irs.gov/pub/irs-pdf/fw4p.pdf>

<b>Certificate Number</b> 111111	<b>Participant Name</b> HERMAN MUNSTER	<b>Current SSN</b> XXX-XX-1111
-------------------------------------	---	-----------------------------------

Federal Withholding (select one):

By Amount  By Percentage

State Withholding (select one):

State: WASHINGTON By Amount: 50.00 By Percentage:


CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change Withholding](#) [Reset](#) [Cancel](#)

## Taxpayer Identification Number Change:

1. Click on the 'Taxpayer Identification Number Change' link

Help Contact Us Logout



MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?

- [View Additional Certificates](#)

Download our [Client Services](#) form.

2. The following screen appears

### Change Tax Identification Number (TIN)

- Provide your updated social security number information within the field below and click on the 'Change TIN' button below to submit your changes
- Social Security Number must be in the following format:
  - Must be 9 digits in length
  - Must be in XXX-XX-XXXX format
  - Must include the dashes within the format stated above
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name	Current SSN
111111	Herman Munster	XXX-XX-1111

**New SSN**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me);
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding;
3. I am a U.S. citizen or other U.S. person as defined by the IRS for federal tax purposes;
4. I am exempt from Foreign Account Tax Compliance Act (FACTA) reporting.

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.


[Change TIN](#) [Reset](#) [Cancel](#)

Type in the new social security number including the dashes.

3. Once you are finished updating your social security number information, click on the 'Change TIN' button

4. The following screen will be displayed

Help Contact Us Logout



**MIDLAND NATIONAL**  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

### Service Request Submitted

Your service request for 'TIN change' has been successfully submitted. Please allow two full business days for processing.

Click [here](#) to return to the Midland National Pension Home Page.

5. Click on the word 'here' to return to the Home page



6. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

### Change Tax Identification Number (TIN)

- Provide your updated social security number information within the field below and click on the 'Change TIN' button below to submit your changes
- Social Security Number must be in the following format:
  - Must be 9 digits in length
  - Must be in XXX-XX-XXXX format
  - Must include the dashes within the format stated above
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name	Current SSN
111111	Herman Munster	XXX-XX-1111

**New SSN**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me);
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding;
3. I am a U.S. citizen or other U.S. person as defined by the IRS for federal tax purposes;
4. I am exempt from Foreign Account Tax Compliance Act (FACTA) reporting.

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change TIN](#) [Reset](#) [Cancel](#)

7. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

### Change Tax Identification Number (TIN)

- Provide your updated social security number information within the field below and click on the 'Change TIN' button below to submit your changes
- Social Security Number must be in the following format:
  - Must be 9 digits in length
  - Must be in XXX-XX-XXXX format
  - Must include the dashes within the format stated above
- Click on the 'Reset' button to clear out your changes
- Click on the 'Cancel' button to cancel the change and be returned to the Home page

Certificate Number	Participant Name	Current SSN
111111	Herman Munster	XXX-XX-1111

**New SSN**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me);
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service that I am subject to backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding;
3. I am a U.S. citizen or other U.S. person as defined by the IRS for federal tax purposes;
4. I am exempt from Foreign Account Tax Compliance Act (FACTA) reporting.

**CA Residents:** Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

[Change TIN](#) [Reset](#) [Cancel](#)

## Certificate Request:

1. Click on the 'Certificate Request' link

The screenshot shows the Midland National website header with the logo and navigation menu. The 'Available Services' section lists several options, with 'Certificate Request' highlighted by a red box. Below this, there is a section titled 'Do You Have Additional Certificates With Us?' with a link to 'View Additional Certificates'. At the bottom, there is a link to download a 'Client Services' form.

2. The following screen appears

The screenshot shows the 'Request New Certificate' form. It includes instructions on how to use the form, input fields for 'Certificate Number' (111111) and 'Participant Name' (Herman Munster), and radio buttons for 'Email' (selected) and 'Mail'. The 'Request Certificate' button is highlighted with a red box.

3. Click on the appropriate radio button to select the delivery method for your certificate (either Email or Mail)
4. Click on the 'Request Certificate' button

5. The following screen will be displayed

The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, a green message box displays the text: "Service Request Submitted" followed by "Your service request for 'certificate request' has been successfully submitted. Please allow two full business days for processing." Below this, it says "Click [here](#) to return to the Midland National Pension Home Page." The word "here" is highlighted with a red box.

6. Click on the word 'here' to return to the Home page

7. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

The screenshot shows the "Request New Certificate" form. It includes a list of instructions: "Click on the appropriate radio button below (e.g. Email or Mail) to indicate by which method to receive your certificate", "Click on the 'Request Certificate' button below to request a copy of your certificate", and "Click on the 'Cancel' button to cancel the change and be returned to the Home page". Below the instructions are two input fields: "Certificate Number" with the value "111111" and "Participant Name" with the value "Herman Munster". Under "Delivery Method (choose one):", the "Email" option is selected with the email address "hmunster@gmail.com". The "Mail" option is also visible with the address "1313 Mockingbird Lane, Mockingbird Heights, WA 11111". A disclaimer for CA Residents is present. At the bottom, there are two buttons: "Request Certificate" and "Cancel", with the "Cancel" button highlighted by a red box.

## Other Request:

1. Click on the 'Other Change' link

The screenshot shows the Midland National website header with the logo and navigation menu. The 'Available Services' section lists several options, with 'Other Change' highlighted by a red box. Below this, there is a section titled 'Do You Have Additional Certificates With Us?' with a link to 'View Additional Certificates'. At the bottom, there is a link to download a 'Client Services' form.

2. The following screen appears

The screenshot shows the 'Other Change Request' form. It includes instructions, input fields for 'Certificate Number' (111111) and 'Participant Name' (Herman Munster), a 'Phone Number' field, and a large 'Description of Request' text area. At the bottom, there are three buttons: 'Submit Request' (highlighted with a red box), 'Reset', and 'Cancel'. A disclaimer for CA Residents is also present.

Type in the appropriate changes in the appropriate fields.

The following fields are required:

- Description of Request

3. Once you are finished updating your request information, click on the 'Submit Request' button

4. The following screen will be displayed

The screenshot shows the Midland National website header with the logo and navigation menu. Below the header, a green box contains the following text: "Service Request Submitted" followed by "Your service request for 'other change' has been successfully submitted. Please allow two full business days for processing." Below this, it says "Click [here](#) to return to the Midland National Pension Home Page." The word "here" is highlighted with a red box.

5. Click on the word 'here' to return to the Home page

6. If you wish to clear out the information you updated prior to submitting the changes, click on the 'Reset' button

The screenshot shows the "Other Change Request" form. It includes a list of instructions: "Provide a description of your request along with a telephone number (in case of questions) in the fields below and click on the 'Submit Request' button below to submit your request", "Click on the 'Reset' button to clear out your information", and "Click on the 'Cancel' button to cancel the request and be returned to the Home page". The form fields are: "Certificate Number" (111111), "Participant Name" (Herman Munster), "Phone Number" (empty), and "Description of Request" (empty text area). At the bottom, there are three buttons: "Submit Request", "Reset" (highlighted with a red box), and "Cancel". A disclaimer for CA Residents is also present.

8. If you wish to cancel the change and be returned to the Home page, click on the 'Cancel' button

**Other Change Request**

- Provide a description of your request along with a telephone number (in case of questions) in the fields below and click on the 'Submit Request' button below to submit your request
- Click on the 'Reset' button to clear out your information
- Click on the 'Cancel' button to cancel the request and be returned to the Home page

<b>Certificate Number</b> 111111	<b>Participant Name</b> Herman Munster
-------------------------------------	---

**Phone Number**


**Description of Request**

CA Residents: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

### Download our Form:

1. If you wish to submit your changes on paper and send to us via email, fax, or postal service, click on the 'Client Services link

Help Contact Us Logout



MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

### Available Services:

- [Address Change](#)
- [Phone Number Change](#)
- [Direct Deposit Change](#)
- [Beneficiary Change](#)
- [Name Change](#)
- [Withholding Change](#)
- [Taxpayer Identification Number Change](#)
- [Certificate Request](#)
- [Other Change](#)

### Do You Have Additional Certificates With Us?

- [View Additional Certificates](#)

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Download our [Client Services](#) form.

- This will open a PDF document in a separate browser window



Corporate Markets | 4225 38<sup>th</sup> St. S, Ste. 201, Fargo, ND 58104  
 Phone: (833) 496-0546 | Fax: 701-433-6625 | CM-PRT@sfgmembers.com

**CLIENT SERVICES REQUEST CHANGE FORM**

**PLEASE PRINT**

Certificate Holder's Name: \_\_\_\_\_

Certificate Number(s): \_\_\_\_\_

Phone Number: \_\_\_\_\_

**ADDRESS CHANGE**

Current Address: \_\_\_\_\_

Current City, State, Zip: \_\_\_\_\_

New Address: \_\_\_\_\_

New City, State, Zip: \_\_\_\_\_

**DIRECT DEPOSIT (Please include a voided check or deposit slip)**

Name of Bank: \_\_\_\_\_

Bank City, State: \_\_\_\_\_

Bank Routing #: \_\_\_\_\_

Bank Account #: \_\_\_\_\_

Checking Account

Savings Account

**ADD OR CHANGE BENEFICIARY(IES)**

Beneficiary Name	Split	Relationship	DOB	SSN	Address

**Total** 100%

If more beneficiaries are needed, please include additional pages.

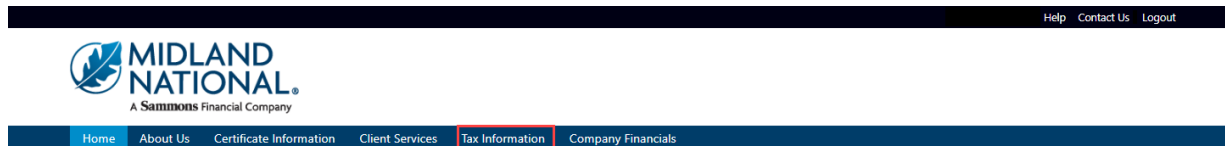
**NAME CHANGE**

Name of annuitant has changed \_\_\_\_\_

- The form is fillable so you can enter your information within this window
- When you have completed your updates within the PDF document, you can 'print' this document following the print instructions available on your computer or 'save' this document following the save instructions on your computer.

## Tax Information ([login](#) required):

1. Click on the 'Tax Information' link on the top navigation bar



2. There are two possible viewing scenarios:

- d. No 1099 Available
- e. 1099 Is Available

**NOTE:** 1099's will only be available for years that Midland National has been administering your pension. You will need to contact your previous pension administrator for 1099's outside of those years. Also, if your policy has been inactive with us for more than 13 months, it will not be available on the website for viewing. You will need to contact us regarding information on your inactive policy.

### No 1099 Available

1. If no 1099 for any year is available for your policy, the following screen will be displayed

#### Tax Information

**Attention:** Disbursement for this certificate has not started and no 1099 information is available.

2. If your policy is no longer active, the following screen will be displayed

#### Certificate No Longer Active

Pension certificate no. 351178 is no longer active and is unavailable for viewing.  
If you believe this incorrect or need further assistance, please email [Customer Support](#).

### 1099 Is Available

1. If a 1099 is available for your policy, the following screen will be displayed

#### Tax Information

1099-R forms are available for the following years:

- [2022](#)
- [2021](#)

2. Click on the appropriate year to view your 1099 document

#### Tax Information

1099-R forms are available for the following years:

- [2022](#)
- [2021](#)



The number of years displayed on the screen will be dependent on the number of years that pension disbursements have been made and the years that Midland National has been administering your pension.

**NOTE:** 1099's will only be available for years that Midland National has been administering your pension. You will need to contact your previous pension administrator for 1099's outside of those years.

3. The 1099 PDF document for that year will be displayed

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. MIDLAND NATIONAL LIFE INSURANCE COMPANY ONE SAMMONS PLAZA SIOUX FALLS, SD 57193 6053732300			1 Gross distribution <b>\$1,000</b>	OMB No. 1545-0119 <b>2022</b> Form 1099-R	<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>
PAYER'S TIN <b>11-1111111</b>			2a Taxable amount <b>\$1,000</b>	Total distribution <input type="checkbox"/>	
RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code <b>Herman Munster</b> <b>1313 Mockingbird Lane</b> <b>Mockingbrid Heights, WA 11111</b>			2b Taxable amount not determined <input type="checkbox"/>	3 Capital gain (included in box 2a)	4 Federal income tax withheld
RECIPIENT'S TIN <b>XX-XX-1111</b>			5 Employee contributions/Designated Roth contributions or insurance premiums	6 Net unrealized appreciation in employer's securities	This information is being furnished to the IRS.
7 Distribution code(s) 7 <input type="checkbox"/> IRA / SEP / SIMPLE <input type="checkbox"/>			8 Other %	9a Your percentage of total distribution %	
10 Amount allocable to IRR within 5 years			11 1st year of desig. Roth contrib.	12 FATCA filing requirement <input type="checkbox"/>	13 Date of payment
Account number (see instructions) <b>2300351111</b>			14 State tax withheld <b>\$20.00</b>	15 State/Payer's state no. <b>WA/1111111111</b>	16 State distribution <b>\$1,000</b>
17 Local tax withheld			18 Name of locality		19 Local distribution

Form 1099-R      www.irs.gov/Form1099R      Department of the Treasury-Internal Revenue Service

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. MIDLAND NATIONAL LIFE INSURANCE COMPANY ONE SAMMONS PLAZA SIOUX FALLS, SD 57193 6053732300			1 Gross distribution <b>\$1,000</b>	OMB No. 1545-0119 <b>2022</b> Form 1099-R	<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>
PAYER'S TIN <b>11-1111111</b>			2a Taxable amount <b>\$1,000</b>	Total distribution <input type="checkbox"/>	
RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code <b>Herman Munster</b> <b>1313 Mockingbird Lane</b> <b>Mockingbrid Heights, WA 11111</b>			2b Taxable amount not determined <input type="checkbox"/>	3 Capital gain (included in box 2a)	4 Federal income tax withheld
RECIPIENT'S TIN <b>XX-XX-1111</b>			5 Employee contributions/Designated Roth contributions or insurance premiums	6 Net unrealized appreciation in employer's securities	This information is being furnished to the IRS.
7 Distribution code(s) 7 <input type="checkbox"/> IRA / SEP / SIMPLE <input type="checkbox"/>			8 Other %	9a Your percentage of total distribution %	
10 Amount allocable to IRR within 5 years			11 1st year of desig. Roth contrib.	12 FATCA filing requirement <input type="checkbox"/>	13 Date of payment
Account number (see instructions) <b>2300351111</b>			14 State tax withheld <b>\$20.00</b>	15 State/Payer's state no. <b>WA/1111111111</b>	16 State distribution <b>\$1,000</b>
17 Local tax withheld			18 Name of locality		19 Local distribution

4. If a 1099 is not yet available for a previous tax year (e.g. 2023 1099's and current year is 2024), the following will be displayed on the screen

### Tax Information

1099-R forms are available for the following years:

- 2023 available on 1/31/2024
- 2022
- 2021

**NOTE:** The specific date of availability may vary from year to year.

## Need Help?

Click on the 'Help' link located in the upper right corner of the Home page to get specific instruction on how to make changes or navigate the website.

The screenshot shows the Midland National Pension Owner Web Site. At the top, there is a navigation bar with links for Home, About Us, Policy Information, Client Services, Tax Information, and Company Financials. A 'Help' link is highlighted in the top right corner. Below the navigation bar is the Midland National logo, which includes a stylized leaf icon and the text 'MIDLAND NATIONAL A Sammons Financial Company'. The main content area features a welcome message: 'Welcome to the Midland National Pension Owner Web Site' and 'Servicing XXXXX pension participants'. Below this is a photograph of an elderly couple sitting outdoors. At the bottom of the main content area, there are two buttons: 'Login' and 'Create Account'. Below the 'Login' button is a link for 'Forgot your password?' and below the 'Create Account' button is a link for 'Need help?'.

If you have questions, you can contact us via phone/fax/email. Our contact information is listed below:

Midland National Pension

4225 38<sup>th</sup> Street South, Suite 201

Fargo, ND 58104

Toll-Free Phone: 1-833-496-0546

Fax: 1-701-433-6625

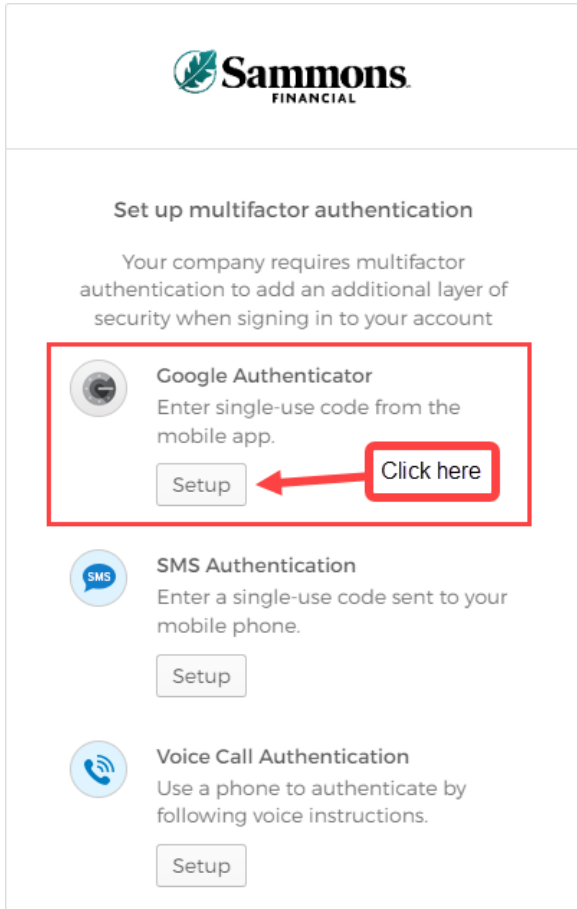
Email: [CM-PRT@sfgmembers.com](mailto:CM-PRT@sfgmembers.com)

Web Support: [CM-PRTWebSupport@sfgmembers.com](mailto:CM-PRTWebSupport@sfgmembers.com)

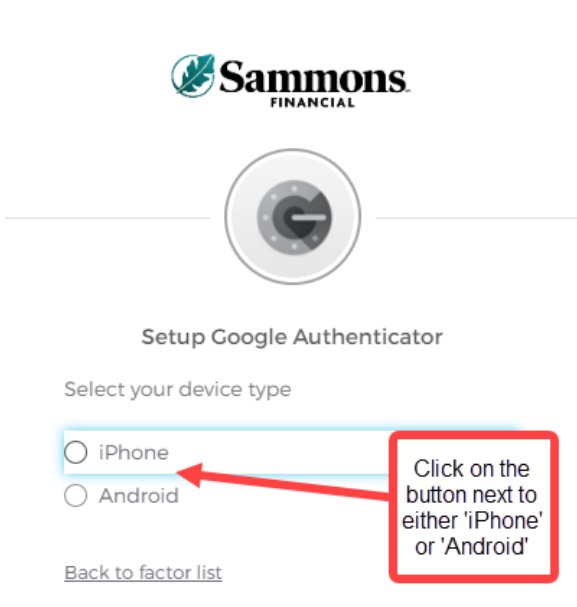
## Appendix A—Authentication Methods

### Google Authenticator:

1. From the authentication screen, click on the 'Setup' button underneath the Google Authenticator method



2. The following screen appears. Click on the appropriate type of mobile device that you own



3. Please note that you will need to download the Google Authenticator app to your mobile device. Once you have completed that step, click on the 'Next' button



### Setup Google Authenticator

Select your device type

iPhone

Android



Download [Google Authenticator from the App Store](#) onto your mobile device.

[Next](#)

[Back to factor list](#)

a. Within the Google Authenticator app, the following screen will be displayed

1:13  
◀ App Store

📶 🔒 🔋



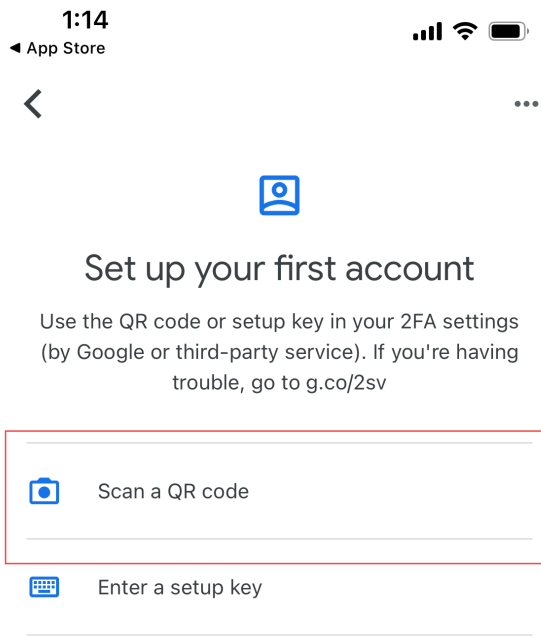
## Stronger security with Google Authenticator

Get verification codes for all your accounts  
using 2-Step Verification

[Get started](#)

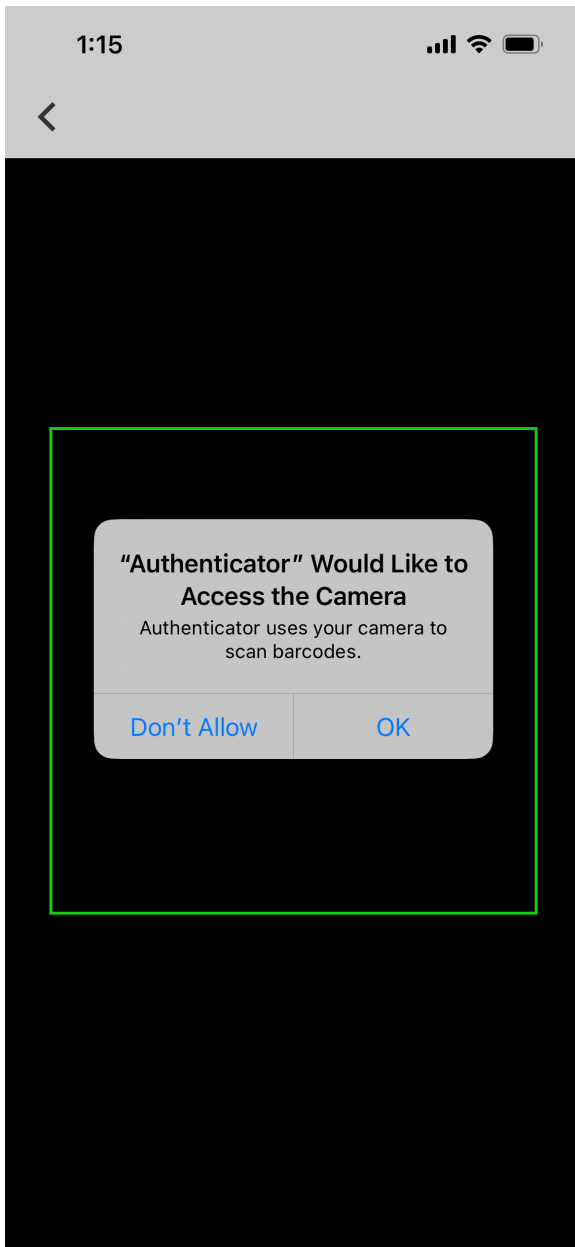


b. Select 'Get Started'. The following screen displays



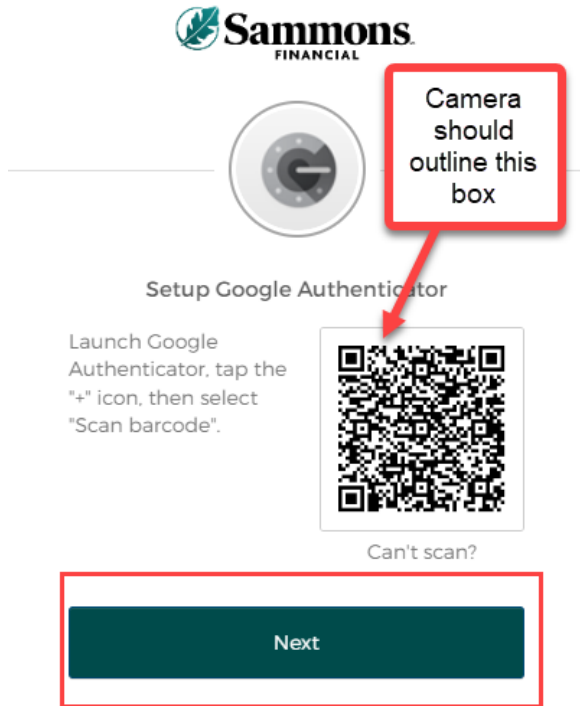
[Import existing accounts?](#)

- c. Select 'Scan a QR code'. This will open up your camera on your phone



- d. Select 'OK'.
- e. The camera will have a green box on it.

4. Return to your browser screen which should be displaying the following screen



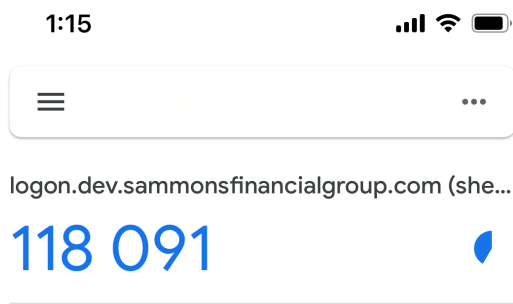
5. Move your camera so that the green box is outlined around the code shown above.

6. Click on the 'Next' button

a. Return to Google Authenticator on your mobile device





b. A code should appear on the application



7. Return to your browser

8. Type in the code that is displayed in Google Authenticator into the box shown on the following screen

Setup Google Authenticator

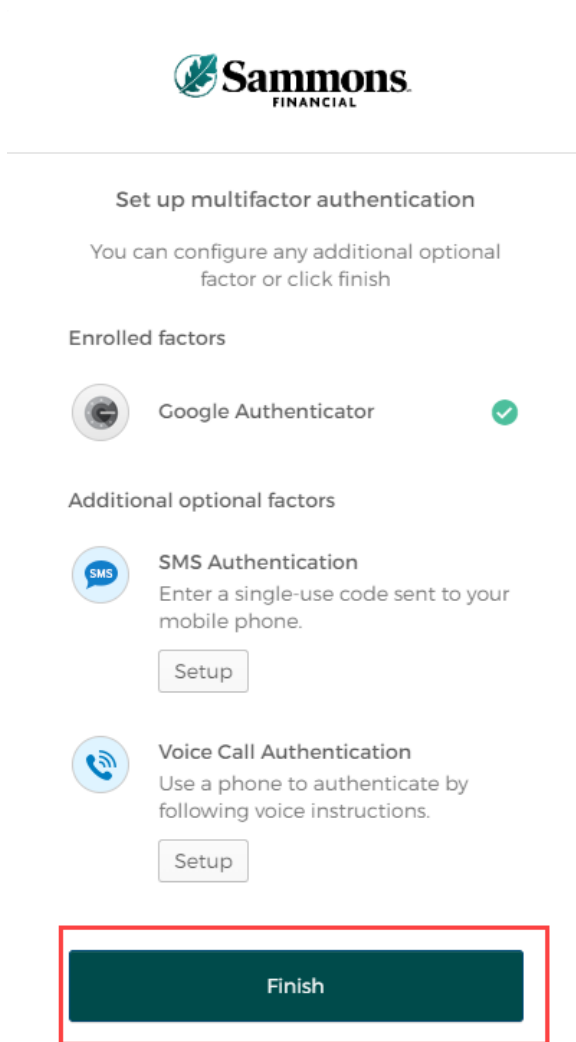
Enter code displayed from the application

Enter Code

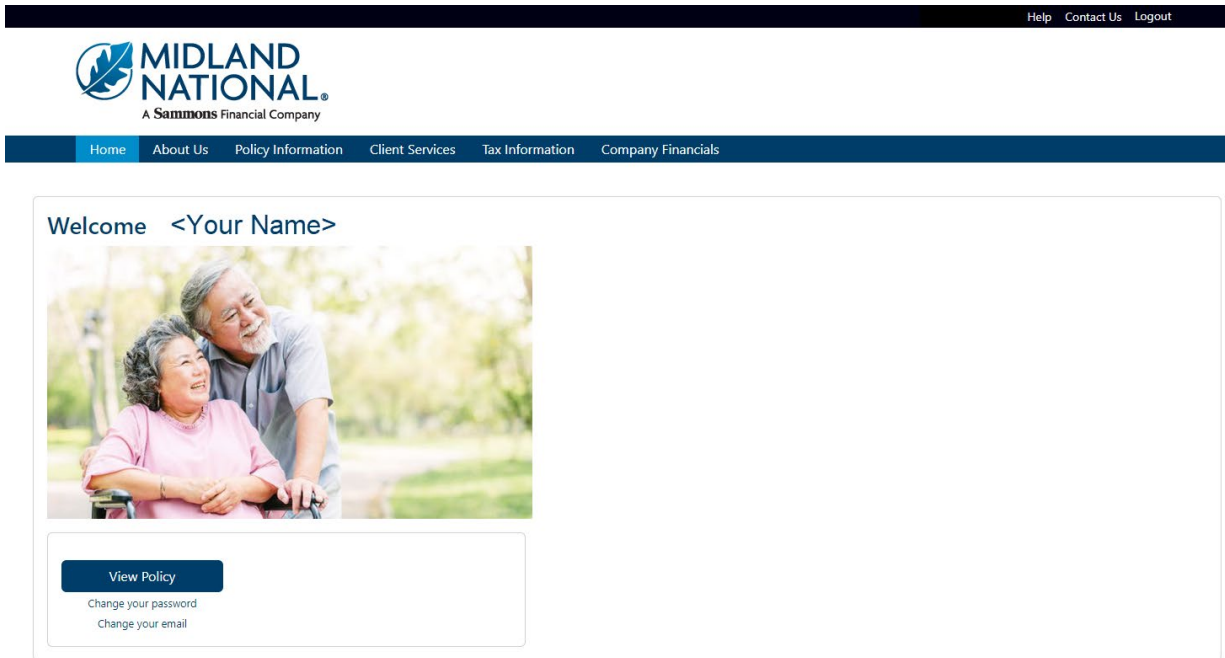
9. Click on the 'Verify' button

10. The following screen will be displayed



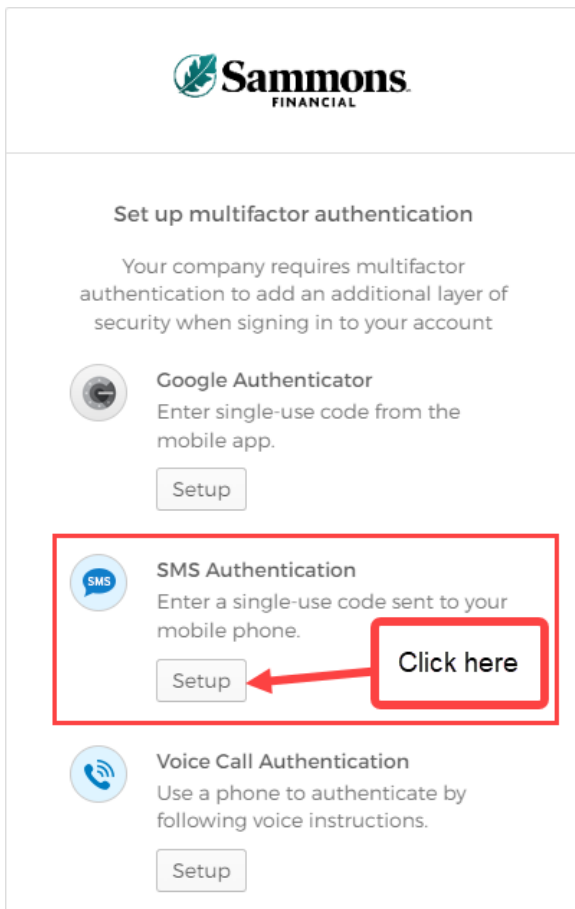
11. Click on the 'Finish' button

12. Once you have completed the multifactor authentication, the following screen will be displayed:

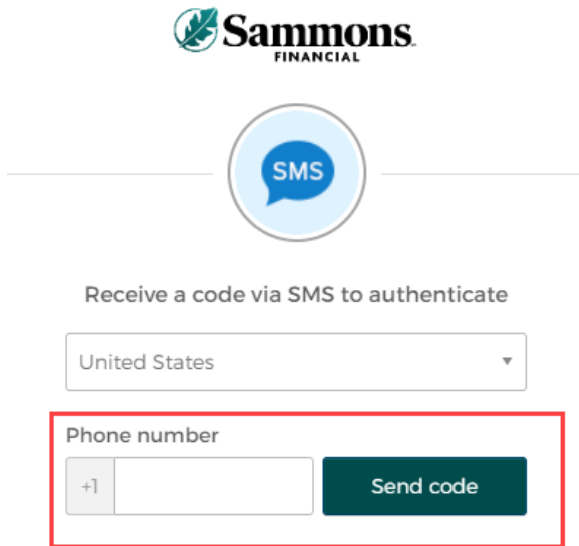


**SMS Authentication:**

1. From the authentication screen, click on the 'Setup' button underneath the SMS Authentication method



2. The following screen displays. Type in the phone number of your mobile device and click on the 'Send code' button



Sammons  
FINANCIAL

SMS

Receive a code via SMS to authenticate

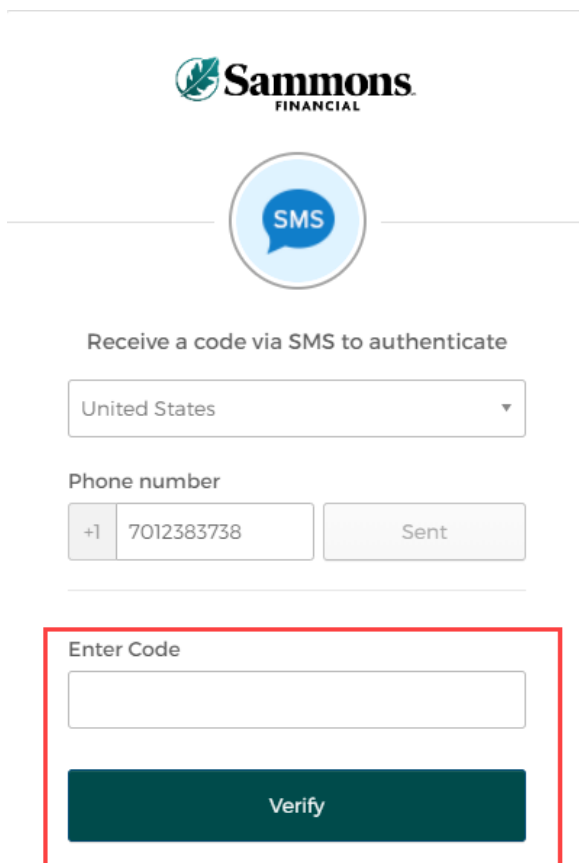
United States

Phone number

+1

Send code

3. A text message will be sent to your mobile device containing a code.
4. After clicking on the 'Send code' button above, the following screen will be displayed



Sammons  
FINANCIAL

SMS

Receive a code via SMS to authenticate

United States

Phone number

+1 7012383738

Sent

Enter Code

Verify

5. Type in the code that was sent to your mobile device in the 'Enter Code' field

6. Click on the 'Verify' button
7. The following screen will be displayed



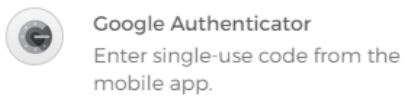
### Set up multifactor authentication

You can configure any additional optional factor or click finish

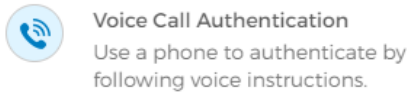
#### Enrolled factors



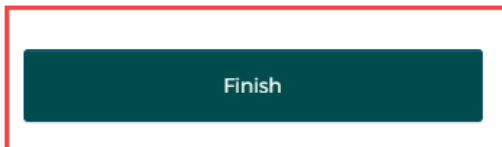
#### Additional optional factors



Setup

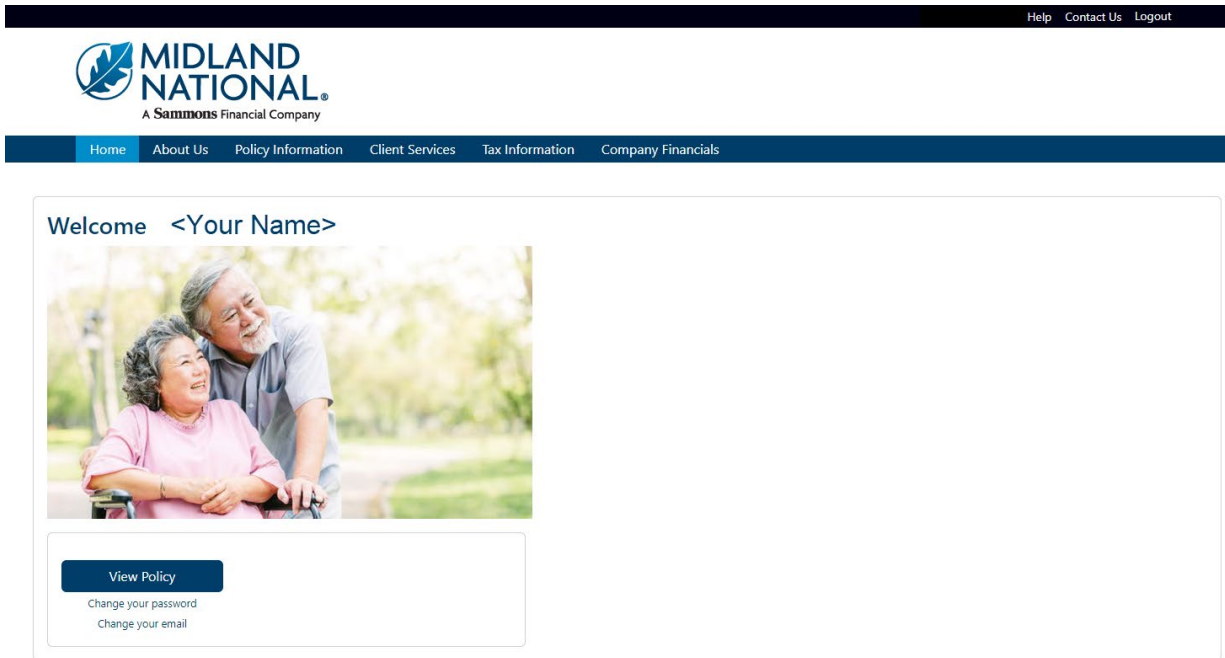


Setup



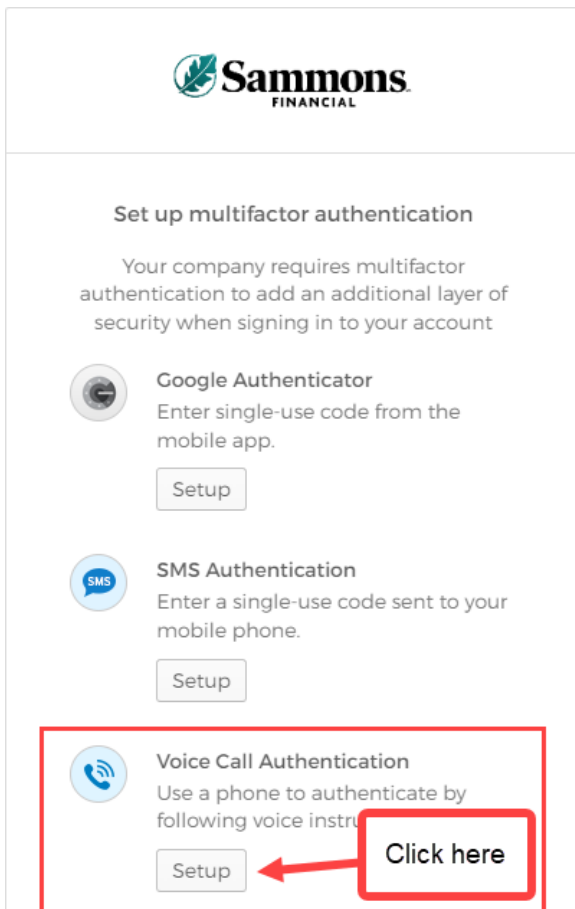
8. Click on the 'Finish' button

9. Once you have completed the multifactor authentication, the following screen will be displayed:





**Voice Call:**

1. From the authentication screen, click on the 'Setup' button underneath the Voice Call Authentication method



2. The following screen will be displayed

Follow phone call instructions to authenticate

United States ▼

Phone number Extension

+1

3. Type in the phone number in the 'Phone Number' field and click on the 'Call' button

4. You will receive a call on your phone that will provide a code via an automated voice



5. After you click on the 'Call' button above, the following screen will be displayed

**Sammons**  
FINANCIAL

Follow phone call instructions to authenticate

United States

Phone number      Extension

+1 7012383738

Calling

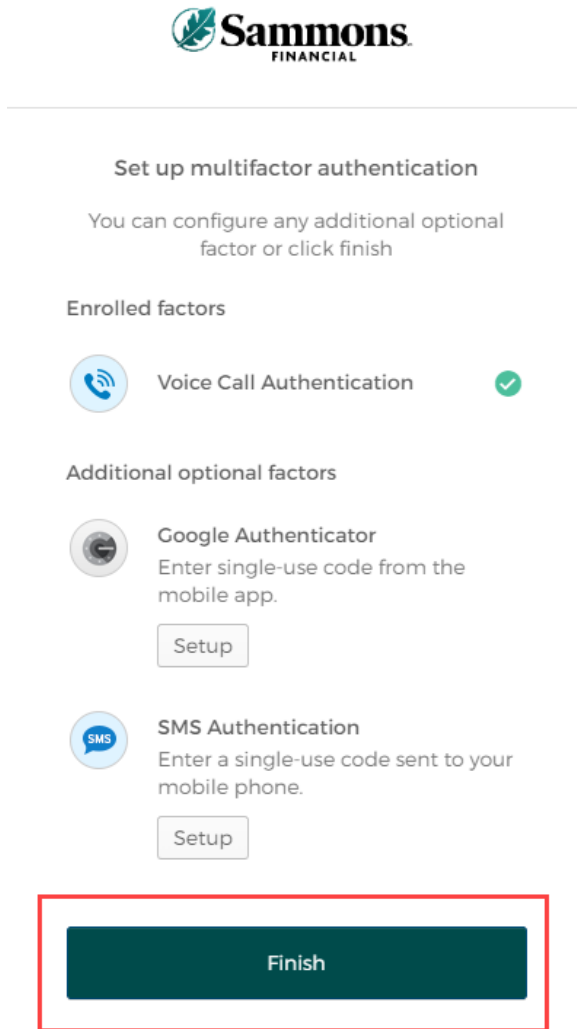
Enter Code

Verify

6. Type in the code provided by the automated voice on your phone call in the 'Enter Code' field.

7. Click on the 'Verify' button


8. The following screen will be displayed



9. Click on the 'Finish' button


10. Once you have completed the multifactor authentication, the following screen will be displayed:

Help Contact Us Logout

 **MIDLAND NATIONAL**  
A **Sammons** Financial Company

Home About Us Policy Information Client Services Tax Information Company Financials


Welcome <Your Name>




[View Policy](#)  
[Change your password](#)  
[Change your email](#)

## Appendix B—Email Confirmation Examples

### Address Change:

 Thu 4/27/2023 2:23 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To  Fritel, Lori  
Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'address change' has been successfully submitted. Please allow two full business days for processing.


If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

### Phone Number Change:

 Thu 4/27/2023 1:47 PM  
cmcweb@sfgmembers.com  
Midland National Pension Web Site Confirmation

To   
Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'phone number change' has been successfully submitted. Please allow two full business days for processing.


If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 701-433-6472 | Fax: 701-433-8472  
[cmcweb@sfgmembers.com](mailto:cmcweb@sfgmembers.com) | [www.sfgcorpmarkets.com](http://www.sfgcorpmarkets.com)

### Direct Deposit Change:

 Thu 4/27/2023 1:55 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To   
Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'direct deposit change' has been successfully submitted. Please allow two full business days for processing.

If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Beneficiary Change:

 Thu 4/27/2023 1:56 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To: [REDACTED]

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'beneficiary change' has been successfully submitted. Please allow two full business days for processing.

If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Name Change:

 Thu 4/27/2023 2:00 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To: [REDACTED]

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'name change' has been successfully submitted. Please allow two full business days for processing.

If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Withholding Change:

 Thu 4/27/2023 2:04 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To: [REDACTED]

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'withholding change' has been successfully submitted. Please allow two full business days for processing.


If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Taxpayer Identification Number Change:

 Thu 4/27/2023 2:06 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To 

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'TIN change' has been successfully submitted. Please allow two full business days for processing.


If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Certificate Request:

 Thu 4/27/2023 2:07 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To 

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!


This email confirms that your service request for 'certificate request' has been successfully submitted. Please allow two full business days for processing.


If you have not completed this request or have any questions, please contact our office.

Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Other Request:

 Thu 4/27/2023 2:10 PM  
cm-prt@sfgmembers.com  
Midland National Pension Web Site Confirmation

To 

Retention Policy SFG Inbox Final (2 years) Expires 4/26/2025

Hello!

This email confirms that your service request for 'other change' has been successfully submitted. Please allow two full business days for processing.

If you have not completed this request or have any questions, please contact our office.


Our contact information is indicated below:

Midland National Life Insurance Company  
4225 38th Street South, Suite 201 | Fargo, ND 58104  
Phone: 833-496-0546 | Fax: 701-433-6625  
[cm-prt@sfgmembers.com](mailto:cm-prt@sfgmembers.com) | [www.midlandnationalpension.com](http://www.midlandnationalpension.com)

## Appendix C—Pending Request Examples

### Address Change:

Help Contact Us Logout



MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

#### Pending Request Exists


There is a pending 'address change' request on this policy dated 04/27/2023 01:34 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

### Phone Number Change:

Help Contact Us Logout



MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

#### Pending Request Exists


There is a pending 'phone number change' request on this policy dated 04/27/2023 01:46 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

### Direct Deposit Change:

Help Contact Us Logout



MIDLAND NATIONAL  
A Sammons Financial Company

Home About Us Certificate Information Client Services Tax Information Company Financials

#### Pending Request Exists

There is a pending 'direct deposit change' request on this policy dated 04/27/2023 01:54 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

## Beneficiary Change:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'beneficiary change' request on this policy dated 04/27/2023 01:55 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

## Name Change:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'name change' request on this policy dated 04/27/2023 01:59 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

## Withholding Change:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'withholding change' request on this policy dated 04/27/2023 02:04 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.



## Taxpayer Identification Number Change:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'TIN change' request on this policy dated 04/27/2023 02:05 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

## Certificate Request:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'certificate request' request on this policy dated 04/27/2023 02:07 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.

## Other Change:

[Help](#) [Contact Us](#) [Logout](#)



[Home](#) [About Us](#) [Certificate Information](#) [Client Services](#) [Tax Information](#) [Company Financials](#)

### Pending Request Exists

There is a pending 'other change' request on this policy dated 04/27/2023 02:09 PM that is still outstanding. No further requests will be allowed until this has been processed.

If you need further assistance, please email [Midland National Pension web support](#).

Click [here](#) to return to the Midland National Pension Home Page.