Reset form

Change of financial professional of record

Before you begin

You can also complete this form entirely online.

- Visit the forms page at johnhancock.com/annuities.
- Find the Change of financial professional of record form.
- Click the link to submit online and follow the step-by-step instructions.

Important information

Use this form to change the registered financial professional of record on your John Hancock annuity contract. This change will be effective once our service office receives it and deems it to be in good order.

Contact information

Website: johnhancock.com/annuities

Phone: 800-344-1029
TTY: 800-555-1158

Mail: See return instructions at end of this form.

1. Contract information

Contract number

Owner information:

Owner name (First) | MI | Last | Date of birth (mm/dd/yyyy)

Phone number | Email address

Address (Street)

City | State | Zip code | Country (if outside the U.S.)

☐ Check here if address provided is permanent address change for your annuity contracts.

Co-owner information (if applicable):

Co-owner name (First) | MI | Last | Date of birth (mm/dd/yyyy)

Phone number | Email address

Address (Street)

City | State | Zip code | Country (if outside the U.S.)

Annuitant information (if different from owner):

Annuitant name (First) | MI | Last | Date of birth (mm/dd/yyyy)

Address (Street)

City | State | Zip code | Country (if outside the U.S.)

Contract number: ______

2. New financial professional information

Please provide the name and commission percentage of each professional. Partnership/splits must be within the same broker-dealer. The sum of the percentages for all professionals, including the servicing professional, must total 100%. If the sum of all percentages does not equal 100%, the difference will be applied to the servicing professional. If no percentages are included, the servicing professional will receive 100% and each additional professional will be listed at 0.00%.

New servicing financial professional:

Professional name (First) ______ MI ______ Last ______ Social Security number ______ Split ID/percentage ______

Firm name ______

Phone number ______ Email address ______

Address (Street) ______

City ______ State ______ Zip code ______ Country (if outside the U.S.) ______

Additional professionals (optional):

Professional name (First) ______ MI ______ Last ______ Social Security number ______ Split ID/percentage ______

Professional name (First) ______ MI ______ Last ______ Social Security number ______ Split ID/percentage ______

3. Signatures and authorizations

By signing below, I understand that commission options for annuity contracts were elected by the original selling firm at the time of issue and are irrevocable. Service fees are paid on contracts that change the broker-dealer of record. Service fees may differ from original commission percentages. If you are changing to a financial professional within the same broker-dealer, the broker-dealer branch manager may sign in lieu of the owners.

SIGN HERE ______
Signature of owner (or fiduciary) ______ Date signed (mm/dd/yyyy) ______

SIGN HERE ______
Signature of co-owner (or fiduciary) (if applicable) ______ Date signed (mm/dd/yyyy) ______

Branch manager of current broker-dealer:

SIGN HERE ______
Signature of current broker-dealer branch manager (if applicable) ______ Date signed (mm/dd/yyyy) ______

Print name (First) ______ MI ______ Last ______

Return instructions

Please submit your completed and signed form via one of the following:

National contracts:
John Hancock Annuities Service Center
PO Box 55444
Boston, MA 02205-5444

New York contracts:
John Hancock Annuities Service Center
PO Box 55445
Boston, MA 02205-5445

All overnight mail:
Annuities Service Center
John Hancock Insurance
410 University Avenue, Suite 55444
Westwood, MA 02090

Register online:

Go to **johnhancock.com/annuities** to create an online account and gain access to contract-specific details and self-service tools. Once registered, select to receive your contract documents electronically under your Paperless settings.