

Additional forms available

Click on the category below to find all John Hancock annuities forms not available on the Forms tab of our website. You can also press Ctrl+F on your PC or Command+F on your Mac to search for a key word.

Contact us

If you still can't find the form you need, [click here](#) to view all the ways you can contact us.

Form categories

- Annuitization
- Asset rebalancing program enrollment
- Dollar Cost Averaging Program enrollment
- Investment option change
- IRS federal tax
- Maintenance
- Rider authorization
- Withdrawal/loan request
- Miscellaneous

Additional forms may also be found on the following websites:

John Hancock Group Annuities
johnhancock.com/groupannuities

John Hancock Structured Settlements
johnhancock.com/help-center/other-resources.html

IRS (federal tax forms)
irs.gov

Look out for the following options when you find your form

- Client online submission**
When you see this Client online submission button, it means a client can complete, sign and submit that form entirely online. Just click the button under the form to be brought to our online form submission page.
- Representative online submission**
When you see this Representative online submission button, it means a representative can complete, sign and submit that form entirely online. Just click the button under the form to be brought to our online form submission page.
- New York residents**
Some of our forms have versions specific to the state of New York. If the form you are looking for notes there is a New York version and you currently reside in New York, please be sure to use that version.

Annuitization

- **Annuitization form (Accommodator) (1307244)**
Receive a guaranteed income stream from your Accommodator variable annuity contract.
➤ [View annuitization guide](#)
- **Annuitization form (AnnuityNote Portfolio Series) (ANNANOTEPSFM)**
Receive a guaranteed income stream from your AnnuityNote Portfolio Series variable annuity contract.
➤ [View annuitization guide](#)
- **Annuitization form (AnnuityNote Series) (40703)**
Receive a guaranteed income stream from your AnnuityNote Series variable annuity contract.
➤ [View annuitization guide](#)
- **Annuitization form (Legacy) (ANNOR)**
Receive a guaranteed income stream from your Legacy variable annuity, with the exception of Accommodator annuities.
➤ [View annuitization guide](#)
- **Annuitization form (Legacy GRIB) (1307202)**
Receive a guaranteed income stream from your Legacy variable annuity contract with a Guaranteed Retirement Income Benefit (GRIB) rider.
➤ [View annuitization guide](#)
- **Annuitization form (Venture® Series) (130713)**
Receive a guaranteed income stream from your Venture Series annuity.
➤ [View annuitization guide](#)
- **Annuitization form (Venture® Series GRIP) (1307110)**
Receive a guaranteed lifetime income stream from your Venture Series annuity contract with the Guaranteed Retirement Income Program (GRIP) rider.
➤ [View annuitization guide](#)
- **Annuitization form (TBOT) (130713TBOT)**
Receive a guaranteed income stream from your TBOT variable annuity contract.
➤ [View annuitization guide](#)

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Asset rebalancing program enrollment

- **Asset rebalancing program enrollment form (Legacy) (ANNSR)**
Enroll in the asset rebalancing program for your Legacy variable annuity contract.
➤ [New York residents \(ANNSRNY\)](#)
- **Asset rebalancing program enrollment form (Venture® Opportunity Series) (1307185)**
Enroll in the asset rebalancing program for your Venture Opportunity Series variable annuity contract.
➤ [New York residents \(1307185NY\)](#)
- **Asset rebalancing program enrollment form (Venture® Series) (130718)**
Enroll in the asset rebalancing program for your Venture Series variable annuity contract.
➤ [New York residents \(130718NY\)](#)
- **Asset rebalancing program enrollment form (Wealthmark Series) (150718)**
Enroll in the asset rebalancing program for your Wealthmark Series variable annuity contract.
➤ [New York residents \(150718NY\)](#)

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Dollar Cost Averaging Program enrollment

- **Dollar Cost Averaging Program enrollment form (Legacy) (ANNDCA)**
Enroll in the Dollar Cost Averaging Program for your Legacy variable annuity contract.
➤ [New York residents \(ANNDCANY\)](#)
- **Dollar Cost Averaging Program enrollment form (Venture® Series) (130709)**
Enroll in the Dollar Cost Averaging Program for your Venture Series variable annuity contract.
➤ [New York residents \(130709NY\)](#)
- **Dollar Cost Averaging Program enrollment form (Wealthmark Series) (150709)**
Enroll in the Dollar Cost Averaging Program for your Wealthmark Series variable annuity contract.
➤ [New York residents \(150709NY\)](#)

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Investment option change

- **Investment option change form (GIFL and GIFL Select) (GIFLIOCF)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your GIFL or GIFL Select variable annuity contract.
➤ [New York residents \(GIFLIOCFNY\)](#)
- **Investment option change form (Legacy) (ANNIO)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your Legacy variable annuity contract.
➤ [New York residents \(ANNIONY\)](#)
- **Investment option change form (TBOT) (ANNIOTBOT)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your TBOT variable annuity contract.
- **Investment option change form (Venture® Opportunity Series) (1307218)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your Venture Opportunity Series variable annuity contract.
➤ [New York residents \(1307218NY\)](#)
- **Investment option change form (Venture® Series) (130721)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your Venture Series variable annuity contract.
➤ [New York residents \(130721NY\)](#)
- **Investment option change form (Wealthmark Series) (150721)**
Make investment option transfers on a one-time basis or to change how future purchase payments will be allocated to your Wealthmark Series variable annuity contract.
➤ [New York residents \(150721NY\)](#)

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IRS federal tax

- **IRS Form W-4P**
Elect tax withholding from your periodic pension or annuity payments.
- **IRS Form W-4R**
Elect tax withholding from your nonperiodic payments and eligible rollover distributions.
- **IRS Form W-8BEN**
Certify your taxpayer identification number as an individual contract owner if you are not a U.S. person.
- **IRS Form W-9**
Certify your taxpayer identification number and status as a U.S. taxpayer.

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Maintenance

- **Annuitant change form (1307137)**
Change or add an annuitant to your annuity contract.
- **Change of broker-dealer of record form—For broker-dealer use only (1307145)**
Change the broker-dealer of record on your annuity contract.
- **Electronic commissions payment authorization form—For broker-dealer use only (ACHEFTFM)**
Authorize John Hancock to pay your weekly commissions for all your applicable annuity contracts via electronic fund transfer (EFT).
[Representative online submission](#)
- **Financial professional licensing/appointment information form—For broker-dealer use only (130724)**
Appoint a broker-dealer, brokerage general agency, or insurance agency to your annuity contract.
- **Power of attorney affidavit form (1307136)**
Certify that a power of attorney executed by a John Hancock annuity contract owner remains in effect.
- **Tax withholding election for periodic payments form (1307130)**
Elect federal and state withholding on your periodic payments from your annuity contract.
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Rider authorization

- **GRIP Rider annual step-up election form (1307166)**
Request to step-up the income base associated with your Guaranteed Retirement Income Program (GRIP) rider to match your contract anniversary value.
[Client online submission](#)
- **JH Value Enhancement Rider/CAREAdvantage Benefit authorization form (1307203)**
Verify your eligibility before receiving benefits from your JH value enhancement rider/CAREAdvantage benefit.
- **JH Value Enhancement Rider/CARE Solutions Plus Benefit authorization form (1304206)**
Verify your eligibility before receiving benefits from your JH value enhancement rider/CARE Solutions Plus benefit.
- **Withdrawal charge waiver request (due to nursing home confinement) form (ANNHW)**
Apply for a waiver of withdrawal charge benefits due to nursing home confinement on your annuity contract with a Waiver of Withdrawal Charge Rider benefit.

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Withdrawal/loan request

- **Electronic 403(b) loan repayment authorization form (80705)**
Pre-authorize electronic fund transfers from your bank account to repay a loan on your existing variable annuity contract.
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- **Inherited/Beneficiary account required minimum distribution request form (1307195)**
Request that John Hancock make a withdrawal from your inherited/beneficiary annuity contract.
[Client online submission](#)
- **Non-ERISA 403(b) loan request form (130716)**
Request a loan from your variable annuity contract.
[Client online submission](#)
- **Pre 59½ systematic withdrawal program enrollment form (130717)**
If you are under age 59½, request a series of substantially equal periodic payments to your account.

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Miscellaneous

- **Alternative issue state annuity contract form—For broker-dealer use only (1307108)**
When the owner/applicant of an annuity contract is signing an application outside his or her resident state.
- **Automatic Investment Program enrollment form (130708)**
Enroll in the Automatic Investment Program and authorize automatic investments from your bank account.
[Client online submission](#)
- **Collateral assignment or release of contract form (130725)**
Assign your annuity contract as collateral.
- **Company complaint form (PS5192US)**
File a complaint in relation to a Life Insurance, Long-term Care, and/or Annuity policy or contract.
- **Divorce distribution instructions form (1307192)**
Facilitate the change of ownership, distribution, or transfer of a deferred annuity contract related to divorce.
- **New York State Insurance Department definition of replacement form (70384)**
Make a comparison of your present policy or contract and the contemplated replacement if you are replacing or otherwise changing the status of an existing NY life insurance policy or annuity contract.
- **New York transfer disclosure form (NYTDFM)**
If your contract is being issued in New York or was previously issued in New York and you are transferring money into it, this form must be completed, signed, dated and submitted in conjunction with your applicable form to satisfy New York Insurance Regulation 187.
[Client online submission](#) [Representative online submission](#)
- **Qualified contract to traditional IRA conversion request form (LOBCHGFM)**
Convert an existing John Hancock qualified annuity contract to a traditional IRA.
- **Roth IRA conversion form (130705)**
Convert an existing John Hancock SIMPLE IRA, SEP IRA, traditional IRA, or other qualified plan to a Roth IRA.
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