

Assurity - all states except CA and FL

INCOME VERIFICATION

Income verification will be required as part of the underwriting process:

- A.** If the applicant is not self-employed and the amount applied for exceeds \$3,000 of monthly income, a copy of either:
- the two most recent pay stubs,
 - a W-2 Form, **or**
 - a tax return is required.

NOTE: Any 2A applicant desiring a “To Age 65” Benefit Period must supply income documentation regardless of the amount of Monthly Benefit applied for with Assurity (see page 4, Benefit Periods).

- B.** When the applicant is self-employed or a commissioned salesperson and the amount applied for exceeds \$2,000 of monthly income, a copy of the most recent tax return, with all schedules and W-2 Forms, is required.

- C.** When the applicant is self-employed or is a commissioned salesperson, and he or she is applying for the “To Age 65” Benefit Period and amount exceeds \$2,000 per month, copies of two years’ tax returns, with all schedules and W-2 Forms, are required; an average of the two years will be used.