

# VOLUNTARY INSTRUCTIONS FOR USE OF FUNDS

If you wish to use maturity funds, or reserve funds, held by the escrow agent, to pay premiums or servicing fees billed by Life Partners Inc. ("LPI"), please complete this form and send it to LPI. Please note, this request only applies if you funded a reserve that has not been exhausted, a policy in which you have an interest has matured and these funds are still on account with the escrow agent or you have other funds on deposit at ATLES or PES. ***Please submit one form for each account/policy.***

Life Partners, Inc.  
204 Woodhew Drive  
Waco, TX 76712

by fax to: 254-751-1025  
by email to: [custsrv@lifepartnersinc.com](mailto:custsrv@lifepartnersinc.com)

Purchaser ID Number (as found on all correspondence and documentation): \_\_\_\_\_

Account ID or Account Number (found on invoice): \_\_\_\_\_

Purchaser / Accountholder Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_ (person completing form, if other than above)

Accountholder Address: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Taxpayer ID / Social Security Number (last four digits only): \_\_\_\_\_

I hereby request LPI to instruct escrow agent to release funds on account as indicated below (check all that apply)

**PLEASE INCLUDE A COPY OF YOUR INVOICE, WITH BAR CODE, IF AVAILABLE.**

Use Funds From	to pay	The Following Fees and/or Expenses	
<b>Maturities</b>		<input type="checkbox"/> <b>Premiums: Invoice#</b> _____	\$ _____
		<input type="checkbox"/> <b>Service Fee(s):</b>	\$ _____

<b>Premium Escrow</b>			
PolicyID _____		<input type="checkbox"/> <b>Premiums: Invoice#</b> _____	\$ _____
		<input type="checkbox"/> <b>Service Fee(s):</b>	\$ _____

<b>Purchaser Account</b>			
		<input type="checkbox"/> <b>Premiums: Invoice#</b> _____	\$ _____
		<input type="checkbox"/> <b>Service Fee(s):</b>	\$ _____

Purchaser ID: \_\_\_\_\_

Please note that you cannot move funds between “qualified (designated IRA) accounts” and non qualified (cash) accounts. Also, neither LPI nor the escrow agents make any representations regarding the ability to transfer funds between “qualified (designated IRA) accounts.” If you want to make a transfer regarding funds in a “qualified (designated IRA) account” please consult with your own tax advisor and/or the Custodian for your account(s).

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Signature of Purchaser / Authorized Signer

**PLEASE REMEMBER TO ATTACH A COPY OF YOUR INVOICE.**

**THIS SECTION BELOW TO BE COMPLETED BY LIFE PARTNERS, INC.**

This is to confirm that on the \_\_\_ day of \_\_\_\_\_, 2015, \$\_\_\_\_\_ was used from maturity funds or other reserves to pay premiums and/or service fees as outlined above.

By: \_\_\_\_\_ Date: \_\_\_\_\_  
LPI Signor

*If for any reason this request cannot be completed in a timely manner, LPI will notify you within 14 days of receipt.*