

For ABA Members, Spouses/Domestic Partners, and Children



Request for Group Insurance from  
New York Life Insurance Company  
51 Madison Avenue  
New York, NY 10010



Please complete this form  
and return it to:  
American Bar Endowment  
321 N. Clark St., Ste 1400  
Chicago, IL 60654-7654

For Puerto Rico residents,  
please mail to:  
Global Insurance Agency, Inc.  
P.O. Box 9023918  
San Juan, PR 00902-3918

OFFICE USE ONLY	
EFFECTIVE DATE	
AGENT CODE	

**QUESTIONS?**  
**CALL 800-621-8981**  
8:15am to 4:30pm, CST  
Monday-Friday

**MEMBER INFORMATION** — Please print in ink or type all answers. Do not use correction fluid or gel pens. Initial and date any changes.

ABA MEMBER ID#		NAME			
ADDRESS					This is my: <input type="checkbox"/> Home <input type="checkbox"/> Office
BUSINESS PHONE		HOME PHONE		MOBILE PHONE	
EMAIL				FAX	
DATE OF BIRTH	HEIGHT _____ft _____in	WEIGHT _____lbs	GENDER <input type="checkbox"/> Male <input type="checkbox"/> Female	SOCIAL SECURITY NO.	

MARITAL STATUS  Married  Single  Civil Union\*  Domestic Partner (DP) \*Eligibility of Civil Unions is determined by State Law

Are you currently a member of the ABA?  Yes  No (ABA membership is required for participation in this plan.)

Do you or your spouse/DP (if proposed for coverage) intend to reside outside the U.S. or Canada in the next 12 months?

Member:  No  Yes Country \_\_\_\_\_ Duration \_\_\_\_\_ Spouse/DP:  No  Yes Country \_\_\_\_\_ Duration \_\_\_\_\_

**SPOUSE/DP INFORMATION** (If applying for spousal/DP coverage)

FIRST NAME		INITIAL	LAST NAME		MAIDEN NAME (if applicable)
DATE OF BIRTH	HEIGHT _____ft _____in	WEIGHT _____lbs	GENDER <input type="checkbox"/> Male <input type="checkbox"/> Female	SOCIAL SECURITY NO.	
BUSINESS PHONE		HOME PHONE		MOBILE PHONE	
EMAIL					

**CHILD INFORMATION** (If applying for child coverage)\*

FIRST NAME		INITIAL	LAST NAME		
DATE OF BIRTH	HEIGHT _____ft _____in	WEIGHT _____lbs	GENDER <input type="checkbox"/> Male <input type="checkbox"/> Female	SOCIAL SECURITY NO.	

\* See product information for definition of eligible dependents. If more than one child is proposed for insurance, attach a separate sheet. Please sign and date the additional sheet.

**PAYMENT OPTION SELECTION** — Save time and postage by selecting our auto-pay option.

**OPTION 1: AUTOMATIC MONTHLY PAYMENT (ACH)** – I (we) hereby authorize the American Bar Endowment (ABE), to initiate debit entries to my (our) checking or savings account at the depository financial institution specified on the attached voided check or completed Auto-Pay Enrollment Form (available at [abendowment.org/pay](http://abendowment.org/pay)), hereafter called DEPOSITORY, and to debit the same to such account. I (we) acknowledge that the origination of ACH transactions to my (our) account must comply with the provisions of U.S. law. This authorization is to remain in full force and effect until ABE has received written notification from me (or either of us) of its termination in such time and in such manner as to afford ABE and DEPOSITORY a reasonable opportunity to act on it.

**OPTION 2: PERIODIC BILLING**  Annual  Semiannual  Quarterly

I hereby apply for the following insurance coverage:

MEMBER INSURANCE AMOUNT:	SPOUSE/DP INSURANCE AMOUNT: <i>(Spouse/DP coverage may not exceed the member's.)</i>	CHILD(REN) INSURANCE AMOUNT:
<input type="checkbox"/> \$500,000	<input type="checkbox"/> \$500,000	<input type="checkbox"/> \$50,000
<input type="checkbox"/> \$400,000	<input type="checkbox"/> \$400,000	<input type="checkbox"/> \$25,000
<input type="checkbox"/> \$300,000	<input type="checkbox"/> \$300,000	
<input type="checkbox"/> \$250,000	<input type="checkbox"/> \$250,000	
<input type="checkbox"/> \$100,000	<input type="checkbox"/> \$100,000	

**BENEFICIARY DESIGNATION**

I hereby make the following beneficiary designation with respect to all insurance under this Plan, and if I am already covered under this Plan, I hereby revoke any prior designation. (The beneficiary for dependent coverage shall be the member as provided in the Group Policy unless I stipulate otherwise on a separate New York Life form.) 1. If naming more than one beneficiary, note if each is to be primary or secondary, and the percentage of death proceeds to be distributed to each. 2. If naming a trust, please indicate the full name and date of the trust.

Beneficiary Name \_\_\_\_\_  
 Relationship to Member \_\_\_\_\_ Social Security # \_\_\_\_\_  
 Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**AUTHORIZATION AND SIGNATURE**

By signing and dating this application, I **request** the insurance indicated; and I **attest** to having read the Fraud Notices indicated on the following page, and that to the best of my knowledge and belief, the answers provided to the questions are true and complete.

I further understand and agree that any dividends payable on the group policy will be paid to the American Bar Endowment (ABE) to support its charitable work in the field of law unless such dividends are claimed by me pursuant to the procedures described below, in the plan brochures, on the back of ABE premium notices, on the ABE website and in each November issue of the *ABA Journal*. (Notice of the approximate percentage of premium available (if any) for contribution or refund will be published in that issue.)

Member's Signature  \_\_\_\_\_ Date

*(Please sign and date in ink.)*

Spouse/DP's Signature  \_\_\_\_\_ Date

*(Necessary only if spouse/DP coverage is requested.)*

**DIVIDEND NOTICE**

**DIVIDEND NOTICE Please note:** Members who wish to contribute dividends payable on this Group Policy to ABE to support its charitable mission need not do anything further. However, members who do not want to contribute these dividends are required to opt out each year, using the procedures described below. By signing this application, you are agreeing to make an **annual** decision whether to opt out. **Do not sign the application if you do not agree with these procedures.**

**For the first policy year of participation only** (which ends on July 31<sup>st</sup> following the effective date of your insurance), if you want to opt out, sign and date the initial election below. After the first policy year of your participation, a **written** request for refund **must be made each year and must reach ABE by December 15<sup>th</sup>**. Written requests may be sent by mail or email to [dividends@abendowment.org](mailto:dividends@abendowment.org). You will be sent a confirmation; retain this for your records. If it is not received within 3 weeks, contact ABE promptly to obtain another.

**INITIAL ELECTION (For new applicants only.** Members currently insured in this plan must send a written request each year to ABE anytime during the year, but no later than December 15.) I do not choose to donate any dividends to ABE for its charitable mission **for the first policy year in which I participate in this program**. In so choosing, I understand that I will not be entitled to a charitable contribution deduction on my income tax return.

X \_\_\_\_\_ / / \_\_\_\_\_  
 SIGNATURE OF MEMBER DATE

**FRAUD NOTICE** *For Residents of all states except those listed below:* Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which may be a crime and may subject such person to criminal and civil penalties. **RESIDENTS OF CO:** *the following also applies:* Any insurance company or agent who defrauds or attempts to defraud an insured shall be reported to the Colorado Division of Insurance within the Department of Regulatory Agencies.

**RESIDENTS OF AR/LA/MD/RI:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance is guilty of a crime and may be subject to fines and confinement in prison.

**RESIDENTS OF CA:** Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or statement of claim containing any materially false information or conceals for the purpose of misleading, information concerning any fact material thereto commits a fraudulent insurance act, which may be a crime and may subject such person to criminal and civil penalties. The falsity of any statement in the application for any policy shall not bar the right to recovery under the policy unless such false statement was made with actual intent to deceive or unless it materially affected either the acceptance of the risk or the hazard assumed by the insurer.

**RESIDENTS OF D.C.:** **WARNING:** It is a crime to provide false or misleading information to an insurer for the purpose of defrauding the insurer or any other person. Penalties include imprisonment and/or fines. In addition, an insurer may deny insurance benefits if false information materially related to a claim was provided by the applicant.

**RESIDENTS OF FL:** Any person who knowingly and with intent to injure, defraud, or deceive any insurer files a statement of claim or an application containing any false, incomplete, or misleading information is guilty of a felony of the third degree.

**RESIDENTS OF KS:** Any person who knowingly presents a false or fraudulent claim for payment of a loss or benefit or knowingly presents false information in an application for insurance may be guilty of insurance fraud as determined by a court of law.

**RESIDENTS OF ME:** It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties may include imprisonment, fines or a denial of insurance benefits.

**RESIDENTS OF NJ:** **WARNING:** Any person who includes any false or misleading information on an application for an insurance policy is subject to criminal and civil penalties.

**RESIDENTS OF NY:** Any person who knowingly and with intent to defraud any insurance company or any other person files an application for insurance or statement of claim containing any materially false information, or conceals for the purpose of misleading, information concerning any fact material thereto, commits a fraudulent insurance act, which is a crime, and shall also be subject to civil penalty not to exceed five thousand dollars and the stated value of the claim for each such violation.

**RESIDENTS OF OK:** **WARNING:** Any person who knowingly, and with intent to injure, defraud or deceive any insurer, makes any claim for the proceeds of an insurance policy containing any false, incomplete or misleading information is guilty of a felony.

**RESIDENTS OF PUERTO RICO:** Any person who, knowingly and with the intent to defraud, presents false information in an insurance request form, or who presents, helps or has presented a fraudulent claim for the payment of a loss or other benefit, or presents more than one claim for the same damage or loss, will incur a felony, and upon conviction will be penalized for each violation with a fine no less than five thousand (5,000) dollars nor more than ten thousand (10,000) dollars, or imprisonment for a fixed term of three (3) years, or both penalties. If aggravated circumstances prevail, the fixed established imprisonment may be increased to a maximum of five (5) years; if attenuating circumstances prevail, it may be reduced to a minimum of two (2) years.

**RESIDENTS OF TN/WA:** It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits.

**RESIDENTS OF VA:** Any person who, with the intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing false or deceptive statements may have violated state law.

7.13 ed

If you have any questions, call us toll-free at 800-621-8981 or our toll-free Solo/Small Firm Help Line at 877-621-7676.

Or email us at [information@abendowment.org](mailto:information@abendowment.org).

Visit us online at [www.abendowment.org](http://www.abendowment.org) for plan information or a personalized rate quote.