



# KNIGHTS OF COLUMBUS

1 COLUMBUS PLAZA, NEW HAVEN CT 06510

## Membership Document

A CATHOLIC, FAMILY, FRATERNAL, SERVICE ORGANIZATION

<b>1</b>	COUNCIL NUMBER	COUNCIL LOCATION (CITY, ST/PROV)	MEMBERSHIP NUMBER	DATE READ	DATE ELECTED	1ST. DEG. DATE
<b>2</b>	<b>TRANSACTION</b> <input type="checkbox"/> NEW MEMBER <input type="checkbox"/> JUVENILE TO ADULT <input type="checkbox"/> REINSTATEMENT (up to 3 months) <input type="checkbox"/> REACTIVATION (inactive insurance) <input type="checkbox"/> READMISSION (up to 7 years) <input type="checkbox"/> REAPPLICATION (over 7 years) <input type="checkbox"/> TRANSFER IN <input type="checkbox"/> HONORARY MEMBERSHIP _____ degree attained <input type="checkbox"/> HONORARY LIFE MEMBERSHIP _____ degree attained <input type="checkbox"/> DATA CHANGE <input type="checkbox"/> SUSPENSION _____ reason <input type="checkbox"/> DEATH _____ mo day yr					
<b>3</b>	LAST NAME _____ FIRST NAME _____ MIDDLE INITIAL _____ TITLE _____ STREET _____ CITY _____ ST/PROV _____ POSTAL CODE _____ COUNTRY (OUTSIDE US) _____ MO _____ DATE OF BIRTH DAY _____ YR _____ *MARITAL STATUS _____ HOME PHONE _____ BUSINESS PHONE _____ CELL PHONE _____ E-MAIL ADDRESS _____ OCCUPATION/EMPLOYER _____ LAST FOUR DIGITS OF TAX ID (e.g., SSN) <b>XXXXX-</b>					
<b>4</b>	*ARE YOU A PRACTICAL CATHOLIC IN COMMUNION WITH THE HOLY SEE? YES NO PARISH NAME, LOCATION (CITY, ST/PROV) _____ FORMER COLUMBIAN SQUIRE? YES NO DID YOU APPLY FOR MEMBERSHIP PREVIOUSLY? YES NO INITIATION DATES 1. FIRST 2. SECOND 3. THIRD 4. FOURTH DATE OF TERMINATION _____ REASON _____ NUMBER OF LAST COUNCIL _____ COUNCIL LOCATION (CITY, ST/PROV) _____					
<b>5</b>	<b>NEW MEMBERS AND THEIR WIVES ARE ELIGIBLE (THROUGH AGE 83) FOR A KNIGHTS OF COLUMBUS ANNUITY AS DESCRIBED ON THE BACK OF THIS APPLICATION (COMPLETE FOR MEMBER) OR THE REVERSE SIDE OF THE DUPLICATE (COMPLETE FOR WIFE)</b> I am applying for myself <input type="checkbox"/> Yes <input type="checkbox"/> No *I am applying for my wife <input type="checkbox"/> Yes <input type="checkbox"/> No					
<b>6</b>	I HEREBY RECOMMEND THE ABOVE APPLICANT FOR MEMBERSHIP. PROPOSER'S SIGNATURE _____ PROPOSER'S MEMBER NUMBER (required) _____			I HEREBY DECLARE THAT THE ABOVE IS TRUE AND CORRECT AND THAT I WILL UPHOLD THE CHARTER, CONSTITUTION AND LAWS OF THE KNIGHTS OF COLUMBUS AND ANY OF ITS COUNCILS IN WHICH I HOLD MEMBERSHIP AND AGREE THAT THE DECISION OF THE BOARD OF DIRECTORS SHALL CONTROL IN ALL MATTERS. SIGNATURE OF APPLICANT _____		
	DATE _____ FINANCIAL SECRETARY _____		SIGNATURES _____		GRAND KNIGHT _____	
	<b>COMPLETE WHEN REPORTING MEMBER DEATH ONLY.</b>			<b>FOR SUPREME COUNCIL OFFICE USE ONLY</b>		
	NEXT OF KIN _____					
	RELATIONSHIP _____					
	STREET _____					
	CITY _____					
	ST/PROV _____ POSTAL CODE _____					
	<b>APPLICANT'S INTERESTS/PREFERENCES</b>					
	Following submission of this Membership Document, you will be contacted in regard to your meeting with the council's admission committee. To aid the committee in preparation for this meeting, you are asked to indicate committee assignment preferences below. If you need more specific information on any of these committees, please inquire during the interview process.					
	<input type="checkbox"/> CHURCH <input type="checkbox"/> FAMILY		<input type="checkbox"/> COMMUNITY <input type="checkbox"/> YOUTH		<input type="checkbox"/> COUNCIL <input type="checkbox"/> MEMBERSHIP RECRUITMENT/RETENTION	
	Please specify interests: _____					
	What do you expect from your membership in the Knights of Columbus? _____ _____					
	In your opinion, what can you do or contribute to assist in the successful operation of this council? _____ _____					
	Date of Interview: _____			Signed: _____ <small>ADMISSION COMMITTEE CHAIRMAN</small>		
	TRANSACTIONS WITH ANNUITY APP(S) TO GENERAL AGENT. ALL OTHER TRANSACTIONS TO SUPREME COUNCIL OFFICE.					

\* THESE QUESTIONS DO NOT APPLY TO PRIESTS AND RELIGIOUS

ORIGINAL COPY

## ANNUITY APPLICATION FOR NEW MEMBER

**Knights of Columbus, A Fraternal Benefit Society, 1 Columbus Plaza, New Haven, CT 06510-3326**

### INFORMATION CONCERNING APPLICANT

1. Name of Applicant (Last-first-middle initial) \_\_\_\_\_

### INFORMATION CONCERNING ANNUITANT

2. Name (Last-first-middle initial) \_\_\_\_\_

Sex \_\_\_\_\_

3. Street \_\_\_\_\_

4. City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip Code/Postal Code \_\_\_\_\_

5. Relationship to Applicant \_\_\_\_\_

Age \_\_\_\_\_

6. Social Security Number/Social Insurance Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

7. Amount Paid With Application: (must be at least \$100.00).  
\$ \_\_\_\_\_

8. Will this annuity replace, in whole or in part, any existing insurance or annuity now in force? Yes  No

If yes, provide the following information regarding the contract to be replaced.

Company	Year Issued	Amount

### INFORMATION CONCERNING BENEFICIARY

9. Name \_\_\_\_\_

Relationship to Annuitant \_\_\_\_\_

10. Social Security Number/Social Insurance Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

### REGARDING MY APPLICATION FOR A KNIGHTS OF COLUMBUS ANNUITY CONTRACT, I UNDERSTAND:

- The long range nature of the annuity being purchased.
- While the Board of Directors will always strive to maintain competitive interest rates, any interest rates not specifically guaranteed at the time of issue of this contract are subject to change from time to time at the discretion of the Board of Directors.
- A surrender charge ranging from 5% to 2% will be imposed on amounts withdrawn from this annuity contract within seven years of deposit, with no surrender charge being made against amounts on deposit over seven years. After the first contract year, if the Accumulation Value is \$5,000 or more, I may withdraw as much as 10% of it once each year with no surrender charge. If a surrender charge is applicable, it will be imposed regardless of my age at the time of withdrawal.
- (a) In the United States: Interest credited to this contract is taxable when proceeds are withdrawn, and a 10% penalty is imposed by the IRS on taxable income withdrawn before the taxpayer is age 59 ½. (This Internal Revenue Service penalty will not be assessed if the taxable income is disbursed in periodic payments made for the life of the taxpayer.)  
(b) In Canada: Interest credited to this contract is reportable on an annual basis, even if there is no distribution.
- The annuity applied for will be cancelled if the applicant is a candidate for membership and has not been initiated into the First Degree of the Order within 90 days of the date of this application.

Upon written request, the Order will provide to you within a reasonable time, reasonable factual information regarding the benefits and provisions of the annuity contract. If for any reason you are not satisfied with the annuity contract, you may return the annuity contract within ten days, or within thirty days if you are sixty-five years of age or older on the date of the application for the annuity contract, after the annuity contract is delivered and receive a refund of all monies paid.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

# ANNUITY APPLICATION FOR NEW MEMBER'S SPOUSE

Knights of Columbus, A Fraternal Benefit Society, 1 Columbus Plaza, New Haven, CT 06510-3326

**INFORMATION CONCERNING APPLICANT**

1. Name of Applicant (Last-first-middle initial) \_\_\_\_\_

**INFORMATION CONCERNING ANNUITANT**

2. Name (Last-first-middle initial) _____	Sex _____
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3. Street \_\_\_\_\_

4. City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip Code/Postal Code \_\_\_\_\_

5. Relationship to Applicant _____	Age _____
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6. Social Security Number/Social Insurance Number _____	Date of Birth _____
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7. Amount Paid With Application: (must be at least \$100.00).  
\$ \_\_\_\_\_

8. Will this annuity replace, in whole or in part, any existing insurance or annuity now in force? Yes  No

If yes, provide the following information regarding the contract to be replaced.

Company	Year Issued	Amount

**INFORMATION CONCERNING BENEFICIARY**

9. Name _____	Relationship to Annuitant _____
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10. Social Security Number/Social Insurance Number _____	Date of Birth _____
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**REGARDING MY APPLICATION FOR A KNIGHTS OF COLUMBUS ANNUITY CONTRACT, I UNDERSTAND:**

1. The long range nature of the annuity being purchased.
2. While the Board of Directors will always strive to maintain competitive interest rates, any interest rates not specifically guaranteed at the time of issue of this contract are subject to change from time to time at the discretion of the Board of Directors.
3. A surrender charge ranging from 5% to 2% will be imposed on amounts withdrawn from this annuity contract within seven years of deposit, with no surrender charge being made against amounts on deposit over seven years. After the first contract year, if the Accumulation Value is \$5,000 or more, I may withdraw as much as 10% of it once each year with no surrender charge. If a surrender charge is applicable, it will be imposed regardless of my age at the time of withdrawal.
4. (a) In the United States: Interest credited to this contract is taxable when proceeds are withdrawn, and a 10% penalty is imposed by the IRS on taxable income withdrawn before the taxpayer is age 59 ½. (This Internal Revenue Service penalty will not be assessed if the taxable income is disbursed in periodic payments made for the life of the taxpayer.)  
(b) In Canada: Interest credited to this contract is reportable on an annual basis, even if there is no distribution.
5. The annuity applied for will be cancelled if the applicant is a candidate for membership and has not been initiated into the First Degree of the Order within 90 days of the date of this application.

Upon written request, the Order will provide to you within a reasonable time, reasonable factual information regarding the benefits and provisions of the annuity contract. If for any reason you are not satisfied with the annuity contract, you may return the annuity contract within ten days, or within thirty days if you are sixty-five years of age or older on the date of the application for the annuity contract, after the annuity contract is delivered and receive a refund of all monies paid.

Applicant's Signature \_\_\_\_\_

Annuitant's Signature \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_

## WHY YOU SHOULD BE A KNIGHT OF COLUMBUS

1. As an integral part of the world's largest and most dynamic Catholic fraternal organization, you will be united with more than 1.7 million brother Knights and their families in over 13,000 local councils in the United States, Canada, Mexico, the Philippines, Poland, Central America and the Caribbean.
2. Your personal involvement as a Knight will provide opportunities, in charity and fraternity, for service to the Church at the local, diocesan and universal levels; to your communities; and to the less fortunate in our midst.
3. Your active participation in council affairs: spiritual, fraternal, family, social, civic-oriented, athletic and recreational — will serve as a school of leadership and enable you to develop qualities that enhance your strengths and abilities.
4. You will enjoy a sense of "belonging" in an organization that shares your religious beliefs, brings together like-minded men joined in a common cause, and offers the opportunity to develop and cement friendships for years to come.
5. Your concerns for your family and for your retirement years can be addressed by the Order's low-cost insurance program, conducted by brother Knights for brother Knights, and assure **their** security and **your** peace of mind.
6. You will share in the sense of pride all Knights feel in knowing that their Order is second to none in support of our Holy Father, our bishops and priests; in working for our fellow man, especially those most in need; and in binding together to preserve traditional values in the face of attacks against the family and innocent human life.

## WHY YOU AND YOUR WIFE SHOULD ACCEPT THIS "NEW MEMBER ANNUITY" OFFER

1. For as little as \$100 each, you and your wife can open an annuity.
2. Your principal is guaranteed by the Knights of Columbus.
3. The Board of Directors sets the interest rate for this plan, but at no time will it drop below 3%. All interest credited in the United States is tax deferred.
4. You may add deposits to your annuity at any time.
5. Everybody can use additional funds during their retirement.