

Trust Certification MetLife Growth and IncomeSM Annuity

Use this form to establish that a grantor trust is the owner of, add trustees to, or remove trustees from an annuity contract issued by Metropolitan Life Insurance Company. Type on screen or print out and fill in. For best results, use CAPITAL letters and black ink. Need more room for information or signatures? Use a copy of the relevant page.

Helpful to Know

- To establish trust ownership of multiple contracts, submit a separate form for each contract.
- eDelivery**
 - You can sign up for eDelivery of certain financial information for this annuity. Simply access Fidelity.com/edelivery and click *Sign up for eDelivery* to select your delivery preferences.
 - If you currently hold a Fidelity personal investing account or another annuity, the delivery preferences you have selected for your financial documents will automatically apply to similar documents (as available) for this annuity.
- The **owner** of the contract must be a revocable grantor trust, and a second owner cannot be added.
- The **annuitant** of the contract must be the grantor, and the grantor's spouse may be added as a joint owner.
- ALL trustees, including new and remaining trustees, must sign and date this form.
- Any *resigning* trustee must provide a signature guarantee on this form.

1. Trust Details

For a living trust, the Taxpayer ID number may be the grantor's Social Security number.

Trust Name			Application OR Contract Number		
U.S. Taxpayer ID Number					
Date Trust was Executed MM DD YYYY	Issued In State	Annuitant's Name			

Individual (Grantor) Who Established Trust

Name			
Address			
City	State/Province	ZIP/Postal Code	Country

Trustee Authorization ► Skip to Section 2 if the trust has ONLY one trustee.

To authorize any future changes to this contract:

Check **ONLY one**.

- ☐ Any trustee may act ALONE
- ☐ Trustees may act on a MAJORITY agreement
- ☐ Trustees must act on a UNANIMOUS agreement ► Default if no other information indicated.
- ☐ CERTAIN trustees must act in agreement:

If you check this box, ► provide names of trustees required to sign requests on behalf of the trust for any future changes.

Trustee Name
Trustee Name
Trustee Name

Form continues on next page. ►►



2. Remove Trustee(s) For existing, trust-owned contracts ONLY. ▶ Skip to Section 3 if you are NOT removing a trustee(s).

<i>For each trustee being removed, provide name and check one reason for removal.</i>	Name of Individual Being Removed			
	<input type="checkbox"/> Resignation <input type="checkbox"/> Death			
<i>Resigning trustee(s) MUST sign and obtain a signature guarantee in Section 4.</i>	Name of Individual Being Removed			
	<input type="checkbox"/> Resignation <input type="checkbox"/> Death			

3. Add New Trustee(s) For existing, trust-owned contracts ONLY. ▶ Skip to Section 4 if you are NOT adding a new trustee(s).

<i>All new trustee(s) MUST sign in Section 5.</i>	First Name	M.I.	Last Name	Social Security or Taxpayer ID Number
	First Name	M.I.	Last Name	Social Security or Taxpayer ID Number
	First Name	M.I.	Last Name	Social Security or Taxpayer ID Number

4. Resigning Trustee(s) ALL resigning trustees must sign and date. ▶ Skip to Section 5 if NO trustee is resigning.

By signing below, you:

- Certify that you are resigning as a trustee of the trust named on this form.

A Medallion Signature Guarantee is required. You can get a Medallion Signature Guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.

Print Resigning Trustee Name	
DATE	Date MM DD YYYY
SIGN	Resigning Trustee Signature

▼ MEDALLION SIGNATURE GUARANTEE ▼

Individual providing signature guarantee Providing this information will avoid delay or rejection of your request.

Guarantor Name	Phone	Extension

Form continues on next page. ▶▶









5. Signature and Date *ALL trustees and annuitants must sign and date.*

Trustee(s)

By signing below, you:

- Certify that all information provided on this form is accurate and complete.
- Affirm that the revocable grantor trust is for the sole benefit of the grantor/annuitant.
- Certify that the named trust is presently in effect and has not been revoked, modified, or amended in any manner that would cause the representations in this form to be incorrect.
- Acknowledge and agree that the Company is relying exclusively on the representations in this agreement and not upon a review of the trust document, even if the trust document has been or is later provided. The Company is permitted to rely upon the representations in this document unless and until notice of any change, amendment, or revocation is provided in writing and delivered to the Company.
- Certify that you are authorized to act as a trustee(s) under the terms of the trust provisions and/or applicable law.
- Understand that you have the power to exercise all rights associated with ownership of an annuity contract, including, but not limited to, purchase, surrender, selection of and transfers between variable options, withdrawal of funds, and assigning the contract.
- Certify that in connection with the purchase, the Annuitant or anyone acting on behalf of the Annuitant has not been offered any consideration or inducement, including but not limited to, cash payments, gifts, insurance, or an interest in this annuity in exchange for participating in this transaction.
- Certify that to the best of our knowledge, the Annuitant is expected to live more than 12 months and that the annuity is not being purchased principally to collect a benefit on account of such Annuitant's death.
- Certify that the sources of the purchase payments have been accurately disclosed on or at the time of application.
- Certify that the purchase payments during the first contract year have not been borrowed from a third party with an intent to be repaid from contract proceeds.
- Certify that the annuity contract has not been purchased (or transferred on a change of ownership request) with the intent at the time of sale (or at the time of transfer on a change of ownership request) to directly or indirectly sell, assign, settle, or otherwise transfer the contract (or the rights to its death benefits, income payments, or withdrawals), or an ownership or beneficial interest in an entity that will own the contract, to a life settlement company, investor, investor group, or third party.
- Certify that the Company will tax report to the named trust on any annuity contract(s) issued to the named Trust.
- Indemnify and hold harmless the Company (and its agents, officers, and employees) and agree to hold it harmless from any loss, claim, expense, or other liability for any instructions given to the Company on this form, or in future actions/transactions by the trust or its trustees. This indemnification extends beyond termination of this document or the annuity contract.
- Understand that a non-qualified annuity contract does not qualify for tax deferral (except if the contract is held by a nonnatural person, or a trust, acting as an agent for a natural person).
- Understand and agree that each year the contract owner, if subject to federal income tax, is obligated to include any increase in this contract's value (adjusted for contributions and distributions) as taxable income when filing federal tax returns.
- Affirm that, if the owner/trust is using the Social Security number of an individual for its tax identification number, that individual must also be named as the annuitant under the contract.
- Acknowledge and agree that the Company is not responsible for any adverse tax consequences, including consequences of the limitations on income payout options upon the death of the annuitant. The Company is not responsible for any representation that the owner is acting as an agent for a natural person or is a grantor trust (according to the meaning of Section 671 et seq. of the Internal Revenue Code, 1986).
- Certify that you have had the opportunity to consult an attorney, to the extent necessary, before signing this document.
- Agree to inform the Company, promptly and in writing, of any trust amendments, change of trustee(s), or other facts and events that would affect or alter this certification.

Print Trustee Name	
Print Trustee Address	
Trustee Signature	Date MM DD YYYY
	

Print Trustee Name	
Print Trustee Address	
Trustee Signature	Date MM DD YYYY
	

Signature and Date continues on next page. ►►



Print Trustee Name	
Print Trustee Address	
Trustee Signature	Date MM DD YYYY
SIGN ▶	▶

Successor Trustee

Print Successor Trustee Name	
Print Successor Trustee Address	
Successor Trustee Signature	Date MM DD YYYY
SIGN ▶	▶

Annuitant(s)

Print Annuitant Name	
Print Annuitant Address	
Annuitant Signature	Date MM DD YYYY
SIGN ▶	▶

Print Annuitant Name	
Print Annuitant Address	
Annuitant Signature	Date MM DD YYYY
SIGN ▶	▶

Did you sign the form? Send the ENTIRE form to Fidelity Investments. After the changes are registered, the contract owner will receive a Revised Annuity Profile.

Questions? Call 800-634-9361.

Regular Mail *Except NY*

Annuity Service Center
PO Box 770001
Cincinnati, OH 45277-0050

Regular Mail *NY only*

Annuity Service Center
PO Box 770001
Cincinnati, OH 45277-0051

Overnight Mail

Fidelity Investments
100 Crosby Parkway, KC2Q
Covington, KY 41015

MetLife Growth and IncomeSM annuity (Policy Form Series No. 6800 (10/09)) is issued by Metropolitan Life Insurance Company (MetLife), New York, NY 10166. The contract's financial guarantees are solely the responsibility of the issuing insurance company. Fidelity Brokerage Services, Member NYSE, SIPC, and Fidelity Insurance Agency, Inc., are the distributors; they are not affiliated with any MetLife company.
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