PennMutual®

☐ The Penn Mutual Life Insurance Company
☐ The Penn Insurance and Annuity Company

Broker-Dealer or Agency Adviser Appointment (69) Data Form Annuities

Please print all answers

Instructions

Please complete and provide the following information for *each Adviser*. Photocopies are acceptable.

- Copy of FINRA Broker Check
- Copies of Resident and Non-Resident Insurance Licenses for All Lines of Business (Adviser is responsible for fees associated with all non-resident appointments requested)
- Check made payable to Penn Mutual for sum of all non-resident appointment fees (PML & PIA)

Broker Information

Broker-Dealer or Agency Name Highland Capital Brokerage				
Adviser Name (as appears on license)				
Social Security #	Date of Birth (mm/dd/yyyy) / /	Sex ☐ Male ☐ Female		
Resident Address Street	City	State	Zip	
Business Address Street	City	State	Zip	
Home Phone ( )	Business Phone ( )	Cell Phone ( )		
Business Fax ( )	Email Address	NPN #		

Contact Information

Contact for Questions and Appointment Confirmation		
Phone Number ( )	Fax Number ( )	Email Address

- Completed forms for resident appointments are to be emailed to CLR-ProducerServiceTeam@pennmutual.com
- If emailing is not possible, then faxes will be accepted at 215-956-8541

Mailing Information

If Adviser requires non-resident appointments, completed form should be mailed along with check for non-resident appointment fees payable to:

Penn Mutual Life Insurance Company
Contract, Licensing & Registration – IBD Team
600 Dresher Road, Mail Code: C2F
Horsham, PA 19044

For any questions, please call 1-800-818-8184, option 6, option 1.