

Allotment Direction Form

☐ This is a New Allotment with United Bank & Capital Trust or First Net.

☐ This is an Updated Allotment with United Bank & Capital Trust or First Net.

**If this is an updated Allotment then we need to know the current policies and deductions. Please visit with the Policy Holder to their prospective PAY SITE- www.liteblue.usps.gov (for postal), www.mypay.dfas.mil (Military/VA), and www.employeeexpress.gov (for most everyone else) to see current companies on allotment. If they are cancelling policies, you may need to call or go to Aflac.com to get policy information. Any policies or companies being kept must be listed on new B-4 form.*

Policy Holder is:

☐ Keeping Current Policies and this is an addition to previous Allotment with UB&C or First Net.

☐ Make this my new Allotment and cancel previous Allotment from UB&C or First Net by either canceling or converting my old policies

Current Policy to Cancel: _____

Current Policy to Keep: _____

Current Policy to Cancel: _____

Current Policy to Keep: _____

Current Policy to Convert: _____

Current Policy to Keep: _____

Current Policy to Convert: _____

Current Policy to Convert: _____

Employee Administered Allotment on **EE Pay site** (please complete at the time the policy is written with the Agent and Policy Holder Present)

The amount of \$_____.00 will be taken out of my paycheck on a bi-weekly basis. I understand that I must have this completed within 48 hours of the application date, and that no insurance policy will be issued or sent to Carrier until I report back to the insurance agent that the Confirmation Page was seen.

Information you will need:

1. Routing number which is 083901650
2. Account Number is (your social security number + 5520)
3. Savings account when asked "type of account".
4. Bi-Weekly dollar amount which is \$_____.00. (Always round up to the nearest dollar. Any overage goes into your savings account.)

☐ Confirmation page was seen by Agent.

☐ Confirmation page was done offsite by Policy Holder and they understand that they received a confirmation of allotment page from EE pay site, and they need to print or copy this page for their records. Not receiving a confirmation of allotment page from EE pay site will cause policy to cancel or lapse.

Employee Phone Number: _____ Email: _____@_____.

Government Employee Name: _____

Government Employee Signature: _____

Signature of Agent: _____ Date: ____/____/____