



**ANNUITY ILLUSTRATION REQUEST**

Client residence state:

Producer state:

Request Date:

Needed by:

Producer: How do you want us to send you info?

Call me - Phone:

Fax:

E-Mail:

New Agent?  Yes  No

Need Contracting?  Yes  No

Client Information		
Owner/ Annuitant Name	DOB	DOB-Age / Tax Status
Annuitant Name <span style="float: right;"><input type="checkbox"/> M <input type="checkbox"/> F</span>	/ /	OR: Primary age <input type="checkbox"/> NQ Joint age <input type="checkbox"/> Qualified
Owner Name <span style="float: right;"><input type="checkbox"/> M <input type="checkbox"/> F</span>	/ /	Owner is: <input type="checkbox"/> Living Trust <input type="checkbox"/> Individual <input type="checkbox"/> Business <input type="checkbox"/> Trust - Other
Product Selection		
<input type="checkbox"/> Fixed Index Annuity <input type="checkbox"/> SPIA <input type="checkbox"/> MYGA We will provide information on FINRA Member Rule 0550 (10/10/10) compliant products		
Single Premium \$	Flexible Premium \$	Premium : <input type="checkbox"/> Annual <input type="checkbox"/> Monthly
Rollover/ 1035: <input type="checkbox"/> Y <input type="checkbox"/> N Are funds subject to a surrender penalty? <input type="checkbox"/> Y <input type="checkbox"/> N If so, what percentage / amount? \$ If available, provide a copy of transferring client's statement (If Known) Cost Basis? \$		
Index Annuity Options		
Design for: <input type="checkbox"/> Income (Rider) or <input type="checkbox"/> Growth <input type="checkbox"/> LTC benefit <input type="checkbox"/> Enhanced DB (rider) When do you want to see income turned on? Age                      Years	Bonus requested <input type="checkbox"/> Premium <input type="checkbox"/> Income account Flexible Premium: <input type="checkbox"/> Y <input type="checkbox"/> N Initial Premium Amount: \$	
MYGA Options	SPIA Options	
Rate Guarantee (yrs): <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 10	Annuity Type: <input type="checkbox"/> Single Life <input type="checkbox"/> Joint Life <input type="checkbox"/> w/Cash Refund <input type="checkbox"/> w/Installment Refund <input type="checkbox"/> Certain Only                      yrs <input type="checkbox"/> Life / Pertain Period                      yrs	
Free Withdrawal in year 1: <input type="checkbox"/> Y <input type="checkbox"/> N other	Income Options: <input type="checkbox"/> Solve for Premium needed for \$_____ Income <input type="checkbox"/> Monthly <input type="checkbox"/> Annual <input type="checkbox"/> Solve for Income with Premium listed above in "Product" <input type="checkbox"/> Monthly <input type="checkbox"/> Annual (If Known) Cost Basis? \$	
Return of Premium: <input type="checkbox"/> Y <input type="checkbox"/> N		
Remarks/ special requests		