

# ANNUITY ANALYSIS



Prepared For: \_\_\_\_\_

Date: \_\_\_\_\_

## BASIC INFORMATION

Owner Names(s)			
Owner Ages(s)		Owner State	
Annuitant Name(s)			
Beneficiary Name(s)			
Contingent Beneficiary Name(s)			

## ANNUITY INFORMATION

Annuity Contract Name		Contract Issue Date	
Company Name		Qualified	Non-Qualified
Cash Value	\$	Balance as of	
Amount Contributed / All Premiums	\$	Surrender Cash Value	\$

## INCOME RIDER

Name		Single	Joint Life
Income Base	\$	Annual Guaranteed Income:	\$

## DEATH BENEFIT RIDER

Name		Standard Death Benefit	Added Cost Rider
Death benefit base / guaranteed floor	\$	List any additional riders	

## RIDER COSTS

Is the surrender charge period still active? (CDSC)	Yes	No	Internal expenses for sub-accounts	\$	%
Contract maintenance fee	\$			\$	%
Mortality & Expense Risk (M&E) / Admin	\$	%		\$	%
Additional Rider Costs	\$	%		\$	%

## CLIENT GOALS FOR ANNUITY

Use for income now*	Use for future income*	Use for Legacy	Other
---------------------	------------------------	----------------	-------

## ADDITIONAL INFORMATION

\*Correlates with the Annual Guaranteed Income Amount