

FINANCIAL PLANNING PROCESS 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	\$	Surrender Cash Value	\$
Amount Contributed / All Premiums	\$		

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		\$	%
Contract maintenance fee			Internal expenses for sub-accounts	\$	%
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
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Additional Information

*Correlates with the Annual Guaranteed Income Amount