ANNUITY

Client Name:

Date Of Birth:

State:

Target Premium:

Spouse Name:

Spouse Date Of Birth:

Where is the money coming from:

- ☐ Traditional IRA
- ☐ Inherited IRA
- ☐ 457 Plan
- ☐ Roth IRA
- ☐ 403B
- ☐ Sale of home / business
- ☐ Pension
- ☐ TSA
- ☐ Annuity
- ☐ Money Market
- ☐ NQ Brokerage Account

Is this account coming from an active employment sponsored plan?

☐ Yes ☐ No

Please have your client consult his/her HR department to see if this money is eligible for rollover. Typically you cannot move active retirement accounts.

Please select the following statement that best describes your client's primary goal:

- ☐ Client is interested in safe growth with best possible returns
- ☐ Client is interested in immediate single lifetime income
- ☐ Client is interested in single lifetime income in 1-5 years
- ☐ Client is interested in single lifetime income in 6-10 years
- ☐ Client is interested in immediate joint lifetime income
- ☐ Client is interested in joint lifetime income in 1-5 years
- ☐ Client is interested in joint lifetime income in 6-10 years
- ☐ Client is interested in income replacement for their spouse only
- ☐ Client is interested in income replacement for themselves if their spouse passes
- ☐ Client is interested in leaving the most amount of money possible as a legacy

Currently taking money from this account? If so, how much?

If not taking money, at what age does the client anticipate taking withdrawls?

Additional Comments: