

ANNUITY REVIEW

Date

BASIC INFORMATION				
Owner Name(s)				
Owner Age(s)		Owner State		
Annuitant Name(s)				
Beneficiary Name(s)				
Contingent Beneficiary Name(s)				
ANNUITY INFORMATION				
Annuity Contract Name		Contract Issue Date		
Company Name		<input type="checkbox"/> Qualified <input type="checkbox"/> Non-Qualified		
Cash Value	\$	Surrender Cash Value	\$	
Amount Contributed / All Premiums		\$		
INCOME RIDER				
Name			<input type="checkbox"/> Single <input type="checkbox"/> Joint Life	
Income Base		Annual Guaranteed Income		
DEATH BENEFIT RIDER				
Name			<input type="checkbox"/> Standard Death Benefit <input type="checkbox"/> Added Cost Rider	
Death benefit base / guaranteed floor		\$	List any additional Riders	
RIDER COSTS				
Is the surrender charge period still active? (CDSC)		<input type="checkbox"/> Yes <input type="checkbox"/> No		
Contract maintenance fee	\$	Internal expenses for subaccounts	\$	___ %
Mortality & Expense Risk (M&E) / Admin	\$		\$	___ %
Additional Rider Costs	\$		\$	___ %
			\$	___ %
CLIENT GOALS FOR ANNUITY				
<input type="checkbox"/> Use for income now*	<input type="checkbox"/> Use for future income* (anticipated year income will begin _____)		<input type="checkbox"/> Use for legacy	<input type="checkbox"/> Other
ADDITIONAL INFORMATION				

*Correlates with the Annual Guaranteed Income Amount