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	\$	\$S				nder Cash V	Value \$		
Amount Contributed / All Premium	s ș								
Income Rider									
Name		Single Joint Life							
Income Base	\$		An	Annual Guaranteed Income: \$					
Death Benefit Rider									
Name		Standard Death Benefit Added Cost Rider							
Death benefit base / guaranteed floo	r \$	\$ 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									
		ture income*		Use for Legacy		Other			
Additional Information									

*Correlates with the Annual Guaranteed Income Amount

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