

Income Annuity Survey

Income Annuity Survey Details	
Prepared By	agent
State of Residence	Wisconsin
State of Issue	Wisconsin
Owner	valued client
Name	Client
Birth Date	March 5, 1961
Sex	Male
Annuity Type	Single Life
Fund Type	Non-qualified
Guarantee Type	Certain period
Premium	\$100,000.00
Cost Basis	\$94,333.00
Purchase Date	March 5, 2026
Payment Frequency	Monthly
Income Start Date	April 5, 2026
Certain Period	10 Years
Return of Premium before Income Start Date	No
Rating Company:	A.M. Best
Rating Level:	All

Financial Institution	Monthly Income	Monthly Taxable Portion	Guaranteed To End Of	Notes	Rating
EquiTrust Life Insurance Company	\$659.07	\$285.79	MAR-06-2026		B++
Athene Annuity and Life Company	\$636.45	\$262.47	MAR-19-2026		A+
Penn Mutual Life Insurance Company	\$634.63	\$260.83	MAR-19-2026 16:00		A+
Minnesota Life Insurance Company - A Securian Co.	\$625.53	\$251.46	MAR-19-2026		A+
New York Life Insurance and Annuity Corporation (NYLIAC)	\$624.25	\$249.70	MAR-19-2026	See below	A++
Symetra Life Insurance Company	\$622.85	\$249.14	MAR-15-2026	See below	A
American National Insurance Company	\$619.84	\$245.46	MAR-12-2026	See below	A
Nationwide Life Insurance Company	\$619.81	\$245.35	MAR-19-2026	See below	A+
Global Atlantic - Forethought Life Insurance Company	\$618.57	\$243.72	MAR-19-2026	See below	A
Corebridge Financial	\$615.21	\$240.55	MAR-19-2026	See below	A
Integrity Life Insurance Company (W&S)	\$607.92	\$232.83	MAR-12-2026	See below	A+
Clear Spring Life and Annuity Company	\$604.77	\$229.81	APR-04-2026		A-
North American Company for Life and Health Insurance	\$598.55	\$223.26	MAR-12-2026	See below	A+
Pacific Life Insurance Company	\$597.21	\$222.16	MAR-19-2026	See below	A+
Protective Life Insurance Company	\$583.88	\$208.33	MAR-19-2026		A+
Lincoln Financial	\$562.21	\$186.09	MAR-19-2026	See below	A

United of Omaha Insurance Company (a Mutual of Omaha company)	\$560.14	\$183.89	MAR-12-2026		A+
Sagicor Life Insurance Company	\$541.31	\$164.56	MAR-12-2026	See below	A-

Financial Institution	Notes
American National Insurance Company	Product offers liquidity options and other features, subject to availability.
Corebridge Financial	Minimum owner issue age is 18, or if earlier, the age of majority as defined by law in state of issue.
	Non-qualified purchases by non-natural entities require approval from the Home Office on a case-by-case exception basis and must have a minimum premium of \$150,000 in order to be considered.
	Additional features are available, such as: commutation withdrawal benefits; a variety of payment increase options; and the ability to customize ownership and payee structure. For more information, contact your AIG Annuities wholesaler.
Global Atlantic - Forethought Life Insurance Company	Product offers liquidity and other features, subject to availability. For more information, please contact the Sales Desk at: Broker Dealer (877)454-4777, IMO (855)447-2537.
Integrity Life Insurance Company (W&S)	Income payments continue for the longer of (1) the life of the annuitant and (2) the period certain.
	This product offers additional features, subject to availability, such as emergency liquidity, increasing payment options, and non-spousal and multi-generational payouts. For more information, please contact your Integrity representative.
	If Fund Type chosen is Traditional or Roth IRA, this product is being purchased by an individual. If Fund Type chosen is Other Qualified, this product is being purchased by a Qualified Plan with unisex payout assumptions. Please ensure the correct Fund Type is chosen as payouts may differ.
Lincoln Financial	This quote is based on an estimated issue date of March 19, 2026. The actual contract issue date may differ and may affect the value of the quote.
	Lincoln requires the owner(s) to be the annuitant(s) except for non-naturally owned contracts.
	Please verify with the Lincoln Home Office that the current rate scale is illustrated.
Nationwide Life Insurance Company	Product offers liquidity options and other features, subject to availability.
New York Life Insurance and Annuity Corporation (NYLIAC)	The Owner and the Primary Annuitant are assumed to be the same person.
	Please note: This product provides return of premium upon death prior to the income start date. Product offers liquidity options and other features, subject to availability. For more information, please contact the Sales Desk at 1-888-474-7725, option 2.
North American Company for Life and Health Insurance	For more information, please contact our North American Sales Desk at (866) 322-7066.
Pacific Life Insurance Company	Product offers liquidity and other features, subject to availability.
Sagicor Life Insurance Company	Liquidity Rider automatically included for no additional cost, subject to availability. For more information, please contact Sagicor Producer Resource Center at 888-SAGICOR.
	Applications available on SagicorAgent.com; via above Website link under Actions.
Symetra Life Insurance Company	Inflation Options: Fractional COLA percentage options that can range from 0.10% to 6.50%.
	Access: 1. Advance Access, subject to state availability, comes standard with all payout options (e.g., life, joint life, period

	certain). Permits client access to up to 30% of the value of future payments (minimum of \$5,000), available 36 months after purchase, and can be accessed as frequently as every 36 months during life expectancy, or the length of the certain period, as applicable.
	Access: 2. Optional commutation to beneficiary, subject to state availability, gives beneficiary option to convert any remaining guaranteed payments into a single lump sum payment based on present value.
	For information or illustrations, contact our Sales Desk at 1-800-706-0700.

Survey Notes

Income received in excess of the investment in the contract is taxable as ordinary income.

Prepared by CANNEX on March 5, 2026 at 13:35:18 ET.

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CANNEX Request: D0770R