

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	December 31, 1958
Sex	Male
Annuity Type	Single Life
Fund Type	Non-qualified
Guarantee Type	Certain period
Premium	\$100,000.00
Cost Basis	\$100,000.00
Purchase Date	December 31, 2023
Payment Frequency	Monthly
Income Start Date	January 31, 2024
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
Minnesota Life Insurance Company - A Securian Co.	\$623.85	\$225.83	JAN-14-2024		A+
American National Insurance Company	\$619.83	\$221.90	JAN-07-2024	See below	A
Corebridge Financial	\$616.88	\$218.99	JAN-14-2024	See below	A
Protective Life Insurance Company	\$605.96	\$207.48	JAN-14-2024		A+
Global Atlantic - Forethought Life Insurance Company	\$592.24	\$193.07	JAN-14-2024	See below	A
Sagicor Life Insurance Company	\$541.31	\$140.74	JAN-07-2024	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	Income start date has been changed to FEB-01-2024.
	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.
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.

Survey Notes

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

Prepared by CANNEX on December 31, 2023 at 11:50:36 ET.

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