Annuity Pre-Qualification Intake

Fixed & Indexed Annuity Review

Client Information

Full Name:

Date of Birth:

State of Residence:

Retirement Assets Being Reviewed

☐ 401(k) / 403(b) ☐ Traditional / Roth IRA ☐ CD / Savings

Approximate Amount Being Reviewed:

Primary Income Goals

☐ Guaranteed Lifetime Income ☐ Principal Protection

Risk & Preference Snapshot

☐ Prefer Fixed / Guaranteed ☐ Prefer Indexed / Growth Potential

Timing

☐ Immediate ☐ 30–60 Days ☐ Exploring

Dominion Asset Management Group | 833-770-2170 | 317-593-4337

Preliminary information only. Not an application. Guarantees subject to insurer claims-paying ability.