

THE ANNUITY FACT FINDER

The Refinancing Retirement annuity review is designed to analyze your clients' current in-force annuities and provide you with an understanding of your clients' current contracts, allowing you to evaluate appropriate options.

The information below and a *current policy statement* is necessary for a complete review of your client's in-force policy and to help us determine the best possible options to consider.

ADVISOR INFORMATION

Name: _____

Phone Number: _____ Email: _____

CLIENT INFORMATION

Owner, if Different than Annuitant: _____ Date of Birth: _____

Annuitant #1 Name: _____ Date of Birth: _____

Annuitant #2 Name: _____ Date of Birth: _____

State of Sale: _____ Current State of Residence: _____

CURRENT POLICY INFORMATION

Policy Number: _____ Issue Date: _____

Company: _____

Objective: _____

Policy Type: Variable Annuity (VA) Fixed Annuity (FA) Fixed Indexed Annuity (FIA)

Account Value: _____

Qualified Non-Qualified

Income Rider: Yes No If yes, has income started? Yes No

CLIENT NEEDS

Objective for Annuity Today: Accumulation Income Legacy Long-Term Care

If Income: Single Payout Joint Payout If Joint Payout, Spouse Date of Birth: _____

Income Deferral Period: _____

Other Considerations: _____
