Preliminary Annuity Fact Finder for Clients

Call 1-800-833-0558 for a customized case design.

Personal Information

Full Name: First_____ Middle_____ Last_____

Date of Birth: _____ Resident State: _____

Prior Planning

On a scale of 1 to 10, where do you fall with satisfaction of your current or future retirement income stream?

1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐ 9☐ 10☐

1= Not satisfied at all 10 = Very satisfied

If you said 5 or less, how much more income do you need and what is your timeframe? _____

_____

On a scale of 1 to 10, how prepared are you for a long term care or extended illness event?

1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐ 9☐ 10☐

1= Not prepared at all 10 = Very prepared

If you said 5 or less, how would you fund this cost? Do you have any non-qualified annuity money that is out of surrender charges(tax-free advantage available)?_____

_____

On a scale of 1 to 10, how concerned are you about protecting money from negative earnings?

1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐ 9☐ 10☐

1= Not concerned at all 10 = Very concerned

If you said 5 or more, what do you have that is at risk of losses? If you are 55 or older, do you have any 401K money that you want to protect? (If so, ask your HR department if they allow in-service withdrawals.) _____

_____

On a scale of 1 to 10, do you have any money you are unhappy with the rate of return?

1☐ 2☐ 3☐ 4☐ 5☐ 6☐ 7☐ 8☐ 9☐ 10☐

1= Not at all unhappy 10 = Very unhappy

If you said 5 or more, what rate are you currently earning?_____