



Annuity Quote Request Form

Advisor Name

Advisor Email Address

Phone #

ANNUITANT INFORMATION

State of
Residence

Annuitant Name

Gender

Date of Birth

Male

Female

Joint Annuitant Name

Gender

Date of Birth

Male

Female

ANNUITY DESIGN

Tax Qualified

Yes

No

Annuity Type

Single Premium Immediate Annuity (SPIA)

Deferred Income Annuity (DIA)

Design

Fixed

Indexed

Fixed annuity Term (Years)

1 2 3 4 5 6 7
8 9 10

SPIA Premium

If requesting Index Income Rider,
What year would you like to start receiving income?

Additional Information

Client Financial Information

Client 1 name: _____ Date of Birth _____ Male Female

Client 2 name: _____ Date of Birth _____ Male Female

State: _____

	First Client Monthly Income	Second Client Monthly Income
Employment Income	\$ _____	\$ _____
Social Security	\$ _____	\$ _____
Pension(s) Income (Gross)	\$ _____	\$ _____
Other Income*	\$ _____	\$ _____

ASSET INFORMATION

Asset	Value	Owner
Retirement Accounts	\$ _____	
Roth Retirement Accounts	\$ _____	
Stocks & Bonds	\$ _____	
Checking & Savings	\$ _____	
CD or Money Market	\$ _____	
Life Insurance Cash Value	\$ _____	
HSA Account	\$ _____	
Do you own your home	\$ _____	

ANNUITY INFORMATION

Annuity	Account Value and Surrender Value	If you are taking income, what is the annual amount?	Type of Annuity: Fixed, Indexed, or SPIA
Annuity 1	\$ _____	\$ _____	
Annuity 2	\$ _____	\$ _____	
Annuity 3	\$ _____	\$ _____	
Annuity 4	\$ _____	\$ _____	

Please Include any related statements and or policies that you have.