



# Annuity Quote Request Form

Advisor Name

Advisor Email Address

Phone #

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## ANNUITANT INFORMATION

State of  
Residence

Annuitant Name

**Gender**

Date of Birth

Male

Female

Joint Annuitant Name

**Gender**

Date of Birth

Male

Female

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## 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