

Annuity Fact-Finding Quote Form

Agent Name _____ Email _____ State _____

Client Name _____ Birthday _____

Spouse Name _____ Spouse Birthday _____

Premium Amount \$ _____ Q or NQ Money? _____

If it is replacing something, is there a surrender charge? _____

Is this income money or just accumulation?

If Income: **Single** **Joint**

How long will it defer before income begins?

Rating an issue? Yes No

Is there a desired amount of income? Or just maximum?

If a Single Premium Immediate Annuity (SPIA) is needed, then additionally we would need what settlement option is desired. (Life only, Life and 5, Cash Refund, etc.)

If Accumulation

What length of product?

Rating an issue? Yes No

What type of crediting method(s) preferred? (if any)

If you have any questions, please give your sales representative a call today! 614-763-2255