

# Fixed Annuity Selector

As you begin the process of planning your clients' retirement income, this annuity selector form will help you gather pertinent information about their goals. This questionnaire is a starting point, meant to help you determine the appropriate fixed annuity options for your clients, and then generate illustrations and product information accordingly.



Client Name \_\_\_\_\_

State of Residence \_\_\_\_\_ Date of Birth \_\_\_\_\_ Gender:  Male  Female

Spouse's Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Gender:  Male  Female

Premium Type:  Qualified  Non-Qualified Premium Amount \_\_\_\_\_ Additional Contributions \_\_\_\_\_

Preferred Rate Type:  Fixed Rate  Index Based Primary Objective:  Accumulation  Income  Wealth Transfer  LTC

What (if any) is the need for annual access to a percentage of the account value? \_\_\_\_\_

Is income the primary goal?  Yes  No If yes, in how many years will distributions begin? \_\_\_\_\_

For payments within year one, would an immediate annuity be an option? \_\_\_\_\_

What is most important:  Guarantees  Potential Performance Assumptions

Income Preference:  Lifetime Income  Single Life  Level Payment  Select Period  Joint Life  Increasing Payment

If select period is chosen, how many years? \_\_\_\_\_

Are there any health issues or additional concerns? \_\_\_\_\_

Agent Name \_\_\_\_\_ Agency Name \_\_\_\_\_

Agent Phone Number \_\_\_\_\_ Agent Email \_\_\_\_\_

Contact **3D Advisors** at **800.785.6913** with additional questions or for more information regarding fixed annuities.  
**info@3dadvisors.com**



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