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.

annuities

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.
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