THE ANNUITY
FACT FINDER

The Annuity Audit review is designed to analyze your clients' current in-force annuities and provide you with an understanding of your clients' current contracts, allowing you to evaluate appropriate options.

The information below and a *current policy statement* is necessary for a complete review of your client's in-force policy and to help us determine the best possible options to consider.

ADVISOR INFORMATION

Name: ______________________________

Phone Number: ______________ Email: ______________

CLIENT INFORMATION

Owner, if Different than Annuitant ______________ Date of Birth: ______________

Annuitant Name: ______________ Date of Birth: ______________

Current State of Residence: ______________

CURRENT POLICY INFORMATION

Policy Number: ______________ Issue Date: ______________

Company: ______________

Objective: ______________

Policy Type: ☐ Variable Annuity (VA) ☐ Fixed Annuity (FA) ☐ Fixed Indexed Annuity (FIA)

Account Value: ______________

Income Base Value: ______________

Death Benefit Value: ______________

☐ Qualified ☐ Non-Qualified

Income Rider: ☐ Yes ☐ No If yes, has income started? ☐ Yes ☐ No

CLIENT NEEDS

Objective for Annuity Today: ☐ Accumulation ☐ Income ☐ Legacy

If Income: ☐ Single Payout ☐ Joint Payout If Joint Payout, Spouse Date of Birth: ______________

Income Deferral Period: ______________

Other Considerations: ______________