

Annuity Quote Request



Agent Information:

Name:

Phone:

Email:

Quote Need By Date:

Client Information:

Name:

Sex:

D.O.B.:

State of Policy Issue:

Asset(s) Available for Illustration:

Tax Status: (for each asset if more than one listed) Qualified, Nonqualified

Special considerations for Assets: (ie surrender charges, taxes etc.)

Concept (goal): Accumulation; Death Benefit; Guaranteed Lifetime Income

For income desired deferral: Single or joint payout.

Annuity Type: Traditional Fixed; FIA; SPIA; ;

MYGA

Additional notes: