

Retire in **STYLE**

SAFETY • TAX-DEFERRED • YIELD • LIQUIDITY • ESTATE PLANNING BENEFITS

Annuity Fact Finder

PERSONAL INFORMATION

Name: _____ Date: _____
Address: _____
Phone (check preferred): Home: _____ Work: _____ Cell: _____
Job Title: _____ Fax: _____
Employer Name: _____ Employer Address: _____
If RETIRED, please list previous Employer: _____
Date of Birth: _____ Age: _____ Marital Status: _____
Preferred Email Address: _____
Number of Children: _____ Children's Ages: _____

SPOUSE'S INFORMATION

Name: _____ Date: _____
Address: _____
Phone (check preferred): Home: _____ Work: _____ Cell: _____
Job Title: _____ Fax: _____
Employer Name: _____ Employer Address: _____
If RETIRED, please list previous Employer: _____
Date of Birth: _____ Age: _____
Preferred Email Address: _____

FINANCIAL OVERVIEW

Annual Household Income

<input type="radio"/> \$0 - \$75,000	<input type="radio"/> \$75,000 - \$150,000	<input type="radio"/> \$150,000 - \$300,000	
<input type="radio"/> \$300,000 - \$500,000	<input type="radio"/> \$500,000 - \$1 M	<input type="radio"/> \$1 M - \$1.5 M	<input type="radio"/> \$1.5 M +

Value of owned assets

Home \$ _____ Investment Real Estate \$ _____
Second Home \$ _____ Real Estate Notes: _____
Term Life \$ _____ Permanent/Variable Life Insurance \$ _____
Disability Insurance Benefit \$ _____ Actual or estimated Social Security Income \$ _____ /month
Savings Accounts/CDs \$ _____ Business/Practice \$ _____
Money Market Accounts \$ _____ Traditional IRA - All Deductible \$ _____
Annuities \$ _____ Stocks \$ _____
Bonds \$ _____ Traditional IRA - Non Deductible \$ _____
Mutual Funds \$ _____ Roth IRA \$ _____
Other _____ \$ _____

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Investment Experience (Provide total years)

Stocks: _____ Bonds: _____ Mutual Funds: _____

Investment Real Estate: _____ Annuities: _____

Other: _____

Total Liabilities

- | | | | |
|---|--|---|---------------------------------|
| <input type="radio"/> \$0 - \$75,000 | <input type="radio"/> \$75,000 - \$150,000 | <input type="radio"/> \$150,000 - \$300,000 | |
| <input type="radio"/> \$300,000 - \$500,000 | <input type="radio"/> \$500,000 - \$1 M | <input type="radio"/> \$1 m - \$1.5 M | <input type="radio"/> \$1.5 M + |

ANTICIPATED CHANGES

Check all that are likely to occur in the next 12 months:

- Marriage
- Make an Investment
- Divorce
- Bonus or Salary Increase
- Have a Child
- Receive an Inheritance
- Job Change or Promotion
- Obtain a Loan
- Graduation
- Buy or Sell a Home
- Care for Dependent Parent(s)
- Buy a Business or Practice
- Pay Off a Loan
- Sell a Business or Practice
- Increase Savings
- Retire

At what age would you like to retire? _____ Spouse? _____

In current dollars, what amount will you need monthly? _____ Spouse? _____

Do you have...

	Yes	No
College savings plan (for children/grandchildren)?	<input type="radio"/>	<input type="radio"/>
A will?	<input type="radio"/>	<input type="radio"/>
A trust?	<input type="radio"/>	<input type="radio"/>
Financial Power of Attorney?	<input type="radio"/>	<input type="radio"/>
Medical Power of Attorney?	<input type="radio"/>	<input type="radio"/>
Advanced Medical Directive?	<input type="radio"/>	<input type="radio"/>
Does your employer provide a retirement plan?	<input type="radio"/>	<input type="radio"/>
Does your spouse's employer provide a retirement plan?	<input type="radio"/>	<input type="radio"/>

Please note that the comments herein do not constitute legal or tax advice or a legal or tax opinion. Any decision to implement the ideas or concepts discussed herein shall be made solely by the client on the advice or his or her legal and tax advisors. Any guarantees in the Insurance policy/annuity referenced here are subject to the claims-paying ability of the issuing insurance company. Annuities are not a deposit, are not insured by the FDIC or by any government agency and may lose value. 5598991 | BRD02359 | Revised 5/22/23