Annuity Rescue Fact Finder

Below are the details necessary to analyze your clients' current annuity strategy to help you develop your recommendations.

Advisor Information

Name:	Phone:	Email:

Policy Information

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

Policy Number:	Issue Date:	State of Sale:
Premium:	Ins. Carrier:	Product Name:
Funds: ☐ Qualified ☐ Non-Qualified	Income Rider? ☐ Yes ☐ No	Death Benefit Rider? ☐ Yes ☐ No
Current Fixed Rate:	Fees? ☐ Yes ☐ No	Fee Types: ☐ M&E ☐ Sub-Account ☐ Rider ☐ Other

Original Purpose of Annuity:

Client Information

Primary Owner:	Joint Owner:
Date of Birth:	Date of Birth:
Primary Annuitant:	Joint Annuitant:
Date of Birth:	Date of Birth:

Annual Income:	Assets:	Liquid Net Worth:

Financial Experience: ☐ Limited ☐ Good ☐ Extensive	Risk Tolerance:

Federal Tax Bracket: ☐ 22% or less ☐ 24% ☐ 32% ☐ 35% 37%

Financial Objectives: