

## Annuity Case Design Request

Date Requested: \_\_\_\_\_

Date Needed by: \_\_\_\_\_

Advisor Name: \_\_\_\_\_

Client Name: \_\_\_\_\_ Client DOB: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Spouse DOB: \_\_\_\_\_

State: \_\_\_\_\_

Q            NQ

Premium Amount: \_\_\_\_\_

Y            N

Replacement                      If Yes, Surrender Charge Amount: \_\_\_\_\_

Purpose of Annuity: \_\_\_\_\_

### For Accumulation

FIA            MYGA            Both

Length of Product Surrender Charge: \_\_\_\_\_

Preferred Crediting Method or Indices (for FIA): \_\_\_\_\_

### For Income

SPIA            GIR            Performance Based

Single Income    Joint Income    Both

Start Income at Age: \_\_\_\_\_

If SPIA, what payout option (Life only, Life + Period Certain, etc...): \_\_\_\_\_

Special Instructions/Comments:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_