



Fixed Annuity Selector

As you begin the process of planning your clients' retirement income, this annuity selector form will help you gather pertinent information about their goals. This questionnaire is a starting point, meant to help you determine the appropriate fixed annuity options for your clients, and then generate illustrations and product information accordingly.

annuities

Client Name: _____ State of Residence: _____

Date of Birth: _____ Gender: Male Female Premium Type: Qualified Non-Qualified

Spouse's Name: _____ Date of Birth: _____ Gender: Male Female

Premium Amount: _____ Additional Contributions: _____

Preferred Rate Type: Fixed Rate Index Based

Primary Objective: Accumulation Income Wealth Transfer LTC

What (if any) is the need for annual access to a percentage of the account value? _____

Is income the primary goal? Yes No If yes, in how many years will distributions begin? _____

For payments within year one, would an immediate annuity be an option? _____

What is most important: Guarantees Potential Performance Assumptions

Income Preference: Lifetime Income Select Period Single Life Joint Life Level Payment Increasing Payment

If select period is chosen, how many years? _____

Are there any health issues or additional concerns? _____

Agent Name: _____

Agent Phone Number: _____

Agent Email: _____

Contact the Crump/WFG Annuity Solution Center for more information

 888.232.4872, Opt. 3, Opt. 4

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