

# Annuity Audit Fact Finder



The Annuity Audit review is designed to analyze your clients' current in-force annuities and provide you with an understanding of your clients' current contracts, allowing you to evaluate appropriate options.

**The information below and a *current policy statement* is necessary for a complete review of your client's in-force policy and to help us determine the best possible options to consider.**

## ADVISOR INFORMATION

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

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

## CLIENT INFORMATION

Owner, if Different than Annuitant: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Annuitant #1 Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Annuitant #2 Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

State of Sale: \_\_\_\_\_ Current State of Residence: \_\_\_\_\_

## CURRENT POLICY INFORMATION

Policy Number: \_\_\_\_\_ Issue Date: \_\_\_\_\_

Company: \_\_\_\_\_

Objective at Original Purchase: \_\_\_\_\_

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

Account Value: \_\_\_\_\_

Qualified  Non-Qualified

Income Rider:  Yes  No If yes, has income started?  Yes  No

## CLIENT NEEDS

Objective for Annuity Today:  Accumulation  Income  Legacy  Long-Term Care

If Income:  Single Payout  Joint Payout If Joint Payout, Spouse Date of Birth: \_\_\_\_\_

Income Deferral Period (When Should Income Start): \_\_\_\_\_

Other Considerations: \_\_\_\_\_

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