



ANNUITY ILLUSTRATION REQUEST FORM

CLIENT INFORMATION

Full Name :

State :

Date of Birth : / / Gender : ☐ Male ☐ Female

Premium : \$

Type of Funds : ☐ Qualified ☐ Non-Qualified

Current Plan :

Client's Main Financial Goal : ☐ Accumulation ☐ Accumulation & Guaranteed Income ☐ Immediate Income

Desired Retirement Age : Desired Annual Income :

Notes :

FINANCIAL OBJECTIVES

Market Risk Strategy Level : ☐ Conservative ☐ Moderate ☐ Aggressive

Future Investment Objectives : ☐ Options for lifetime income ☐ Preserve Principal ☐ Reduce the effects of inflation
☐ Income tax deferral ☐ Increase return on assets ☐ Pass assets to heirs
☐ Increase Current Income ☐ Charity

PRODUCT

Do you have a product in mind? : ☐ Yes ☐ No Carrier :

Product :

Need By Date : / /

Once completed - please send to ataylor@fegcorp.com