

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.



Client Name _____ State of Residence _____

Date of Birth _____ Gender: Male
Female

Premium Type: Qualified
Non-Qualified

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 If select period is chosen, how many years? _____

Are there any health issues or additional concerns? _____

Agent Name _____ Agency Name _____

Agent Phone Number _____

Contact the [Tellus Annuity Solution Center Sales Desk](#) with additional questions or for more information regarding fixed annuities.

800.883.8744, option 3, option 1, option 1

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Please FAX to: (210) 341-7909

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