



Request for Annuity Quote

Date Submitted: _____

Producer Name: _____

Producer Phone: _____

Producer Email Address: _____

Client Name:

Gender:	Male	Female
Date of Birth:		
Resident State:		
Annuity Type:	☐ Qualified	☐ Non-Qualified

Fixed Deferred Annuity Product

Fixed Indexed Annuity	Guaranteed Multiple Year Annuity	Single Premium Deferred Annuity
Premium \$ _____	Number of Years _____	Premium \$ _____

Single Premium Immediate Annuity (SPIA)

Premium _____	Income Payment Frequency: Annual Semi-Annual Quarterly Monthly
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SPIA - Income Payment Options:

Period Certain & Life	Period Certain	Installment/Cash Refund
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Comments:

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