



Initial Analysis for Annuity Prospect

Prospect Name _____ Age/DOB _____
Investment Amount _____ Broker _____

- 1) Does the client want a Fixed Rate Return or Market-linked Return?
- 2) When does the client need to access the funds?
- 3) How does the client anticipate receiving the money?
(i.e. Lump Sum, Income)
- 4) Is the money Qualified or Non-Qualified?
- 5) Does the client have a spouse? Age/DOB?
- 6) Does the client want a bonus? If so how much?
- 7) Is the client concerned about Guaranteed returns?

ADDITIONAL NOTES:

P.O. Box 15707 Baton Rouge, LA 70895-5707 ★

Local: 225-292-3222 ★ Toll Free: 1-800-256-3222 ★ Fax: 225-295-1079
www.insuranceservicesofamerica.com

Insurance Services of America
P.O. Box 15707
Baton Rouge, LA 70895-5707
1.800.256.3222

ANNUITY AGENT PROPOSAL REQUEST

Agent Name: _____ Phone: _____

Address: _____

Fax: _____ E-Mail: _____

CLIENT INFORMATION

Annuitants Name (optional) _____ Age _____ DOB _____

Issue State _____ Male Female

Jt. Annuitants Name (optional) _____ Age _____ DOB _____

Issue State _____ Male Female

DEFERRED ANNUITY QUOTE

Company: _____ Product: _____

\$ _____ Initial Premium Qualified Non-Qualified

\$ _____ Additional Premium Monthly Annually

Illustrate Withdrawals Monthly Annually

Show withdrawals beginning: Immediately Starting year 2 Other _____

Amount of withdrawals: Interest Only 10% Free Specified Amount \$ _____

Other: _____

SINGLE PREMIUM IMMEDIATE ANNUITY QUOTE

Provide Best Quote Available (or) Quote Company: _____

\$ _____ Initial Premium (OR) \$ _____ Benefit (solve for Premium)

Qualified Non-Qualified Non-Qualified Cost Basis \$ _____

Illustrate Payments: Monthly Quarterly Semi-Annually Annually

Starting: One Modal Period from Issue One Year From Issue Other _____

_____ Yrs. Certain and Life _____ Yrs. Certain Only Life Only Cash Refund

Joint & Survivor _____ % Joint & Survivor _____ %, with _____ Yrs. Certain

Other: _____

*If you have a quote you are trying to beat please provide Benefit amount \$ _____ or

Premium Amount \$ _____.

Please fax this form to: 225.292.3560 to request your annuity illustration.

Preferred method of response: Faxed E-Mailed Call Me With Quote

(Not all quotes can be e-mailed if they cannot they will be faxed.)

Feel free to contact a Marketing Representative at 800.256.3222 with any questions!

Insurance Services of America, Inc. - Baton Rouge, Louisiana