

Annuity Policy Review (APR) Fact Finder

An Annuity Policy Review (APR) is designed to analyze your clients' current in-force annuities and provide you with an understanding of your clients' current plans, allowing you to evaluate appropriate options. The information below is necessary for a complete review of your clients' current policy and to help us determine the best possible options to consider.

Producer Information

| Name: | Phone Number: | Email Address: |
|-------|---------------|----------------|
| | | |

Client & Policy Information

| Owner 1: | Date of Birth: | | State of Sale | e: |
|--------------------------------|----------------|--|---------------|----|
| Owner 2: | Date of Birth: | | | |
| Annuitant 1: | Date of Birth: | | | |
| Annuitant 2: | Date of Birth: | | | |
| Current Annuity Policy Number: | | | Issue Date: | |
| Company: | Policy Type: | Variable Annuity (VA) Fixed Annuity (FA) Fixed Index Annuity (FIA) | | |

Original Policy Design

| Premium: | Source of Funds: | Qualified | □ Non-Qualified | | | | |
|------------------------------|------------------|-----------|-------------------|--|--|--|--|
| Fees? 🗌 Yes 🗌 No | Income Rider? | 🗌 Yes | 🗆 No | | | | |
| Original Purpose of Annuity: | | | | | | | |
| Financial Experience: | imited 🗌 Good | Extensive | Annual Income: | | | | |
| Federal Tax Bracket: 🗌 25 | Assets: | | | | | | |
| Risk Tolerance: | Time Horizon: | | Liquid Net Worth: | | | | |
| Financial Objectives: | | | | | | | |
| | | | | | | | |

Contact CBS Brokerage at 763.450.1870 for more information.

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