

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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