

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:
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Client & Policy Information

Owner 1:	Date of Birth:	State of Sale:
Owner 2:	Date of Birth:	
Annuitant 1:	Date of Birth:	
Annuitant 2:	Date of Birth:	
Current Annuity Policy Number:		Issue Date:
Company:	Policy Type: <input type="checkbox"/> Variable Annuity (VA) <input type="checkbox"/> Fixed Annuity (FA) <input type="checkbox"/> Fixed Index Annuity (FIA)	

Original Policy Design

Premium:	Source of Funds: <input type="checkbox"/> Qualified <input type="checkbox"/> Non-Qualified
Fees? <input type="checkbox"/> Yes <input type="checkbox"/> No	Income Rider? <input type="checkbox"/> Yes <input type="checkbox"/> No
Original Purpose of Annuity:	
Financial Experience: <input type="checkbox"/> Limited <input type="checkbox"/> Good <input type="checkbox"/> Extensive	Annual Income:
Federal Tax Bracket: <input type="checkbox"/> 25% and under <input type="checkbox"/> 28%-35% <input type="checkbox"/> 39.6%	Assets:
Risk Tolerance:	Time Horizon: Liquid Net Worth:
Financial Objectives:	

Contact CBS Brokerage at 763.450.1870 for more information.