

Annuity Maximization Fact Finder

Client Information

Client's Name (First and Last): _____

Age: _____

Underwriting: NS/P NS/S S/P S/S Uninsurable

State: _____

Spouse's Name (First and Last): _____

Age: _____

Underwriting: NS/P NS/S S/P S/S Uninsurable

State: _____

Historical Information

Post-76 Taxable Gifts: _____

Prior Gift Taxes Paid: _____

Number of Annual Exclusions: _____

Presenter Information

Presenter's Name (First and Last): _____

Company: _____

Address: _____

Address 2: _____

City: _____ State: _____

Zip Code: _____ Phone: _____

Fax: _____ Email: _____

Plan Information

Name(s) of Heir(s): _____

Total Estate Value _____

After-Tax Growth Rate of Estate Assets: _____ %

After-Tax Growth Rate of ILIT Assets: _____ %

Income Tax Bracket: _____ %

Income in Respect of Decedent Bracket: _____ %

Plan Information (continued)

Consumer Price Index Rate: _____ %

Current Annuity Value: _____

Cost Basis: _____

Accumulation Rate After Taxes: _____ %

Withdrawals Approach (choose one)

Schedule: _____

Annual Exclusions for _____ Years

Default Level Amount: _____

Annuitize Approach (choose one)

Calculate Generic Single Premium Immediate Annuity:

Type: _____ Fixed or Life Only

Fixed Period _____

Input Annuitization Information:

Exclusion Ratio (% Exempt): _____

Annual SPIA Gross Income: _____

Net After-Tax Income from SPIA: _____

Life Insurance Information

Product: Performance UL Performance UL-Core

Protection UL-G Survivorship UL-G

Performance SUL VUL Accumulator

Protection VUL MVLII

MVL Edge Survivorship VUL

Performance SVUL Premier Whole Life

Survivorship WL

Premium: _____ Number of Years: _____

Death Benefit: Solve or Specified \$ _____

Increasing or Level: _____

State: _____