

ANNUITY ANALYSIS



LEVEL FOUR
Financial
A DIVISION OF
LEVEL FOUR GROUP, LLC

Prepared For: _____

Date: _____

BASIC INFORMATION

Owner Names(s)			
Owner Ages(s)		Owner State	
Annuitant Name(s)			
Beneficiary Name(s)			
Contingent Beneficiary Name(s)			

ANNUITY INFORMATION

Annuity Contract Name		Contract Issue Date
Company Name		Qualified Non-Qualified
Cash Value	\$	Balance as of
Amount Contributed / All Premiums	\$	Surrender Cash Value \$

INCOME RIDER

Name		Single	Joint Life
Income Base	\$	Annual Guaranteed Income:	\$

DEATH BENEFIT RIDER

Name		Standard Death Benefit	Added Cost Rider
Death benefit base / guaranteed floor	\$	List any additional riders	

RIDER COSTS

Is the surrender charge period still active? (CDSC)	Yes	No	Internal expenses for sub-accounts	\$	%
Contract maintenance fee	\$			\$	%
Mortality & Expense Risk (M&E) / Admin	\$	%		\$	%
Additional Rider Costs	\$	%		\$	%

CLIENT GOALS FOR ANNUITY

Use for income now*	Use for future income*	Use for Legacy	Other
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ADDITIONAL INFORMATION

*Correlates with the Annual Guaranteed Income Amount

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