



**SUBMIT REQUEST TO:**  
indexillustrations@equisfinancial.com

# REQUEST FOR INDEXED ANNUITY ILLUSTRATION

Agent Name: \_\_\_\_\_ Regional Manager: \_\_\_\_\_

Client Name: \_\_\_\_\_ Client State: \_\_\_\_\_ Client DOB: \_\_\_/\_\_\_/\_\_\_

Gender: \_\_\_\_\_

What is the anticipated amount of this annuity? \_\_\_\_\_

Where is the money coming from to fund this annuity?

401(k): \_\_\_\_\_ IRA: \_\_\_\_\_ Bank Savings/CD: \_\_\_\_\_ Other: \_\_\_\_\_

How are the funds currently invested?

Mutual Funds: \_\_\_\_\_ Stocks/Bonds: \_\_\_\_\_ Bank Savings/Money Market: \_\_\_\_\_ CDs: \_\_\_\_\_

Indexed Annuity: \_\_\_\_\_ Variable Annuity: \_\_\_\_\_ Fixed Rate Annuity: \_\_\_\_\_ Other: \_\_\_\_\_

Is this a replacement of an annuity? \_\_\_\_\_ If yes, what is the surrender charge %? \_\_\_\_\_

What carrier is the current annuity with? \_\_\_\_\_

What is the client's objective for this annuity?

Safe Growth Only: \_\_\_\_\_ Guaranteed Lifetime Income: \_\_\_\_\_ Growth Then Income: \_\_\_\_\_

Leave to Adult Children: \_\_\_\_\_ Other: \_\_\_\_\_

If income is the objective: Income to start at age: \_\_\_\_\_ or year: \_\_\_\_\_

Lifetime payout for: Owner Only (Single Life) \_\_\_\_\_ OR Owner and Spouse (Joint Life) \_\_\_\_\_

Suitability: Does the client understand the long-term nature of annuities? \_\_\_\_\_

Does the client have other assets that are liquid (available without penalty)? \_\_\_\_\_

NOTE: Clients must have at least 6 months of living expenses in liquid financial assets. At F&G Life they need at least \$20,000 in liquid assets and at least 6 months of living expenses in liquid financial assets in order to pass Suitability Review. (Income does not count as a liquid financial asset)

Have you completed Annuity Suitability Training? \_\_\_\_\_ Product-Specific Training: \_\_\_\_\_



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# REQUEST FOR IUL ILLUSTRATION

Agent Name: \_\_\_\_\_ Regional Manager: \_\_\_\_\_

Client Name: \_\_\_\_\_ Client State: \_\_\_\_\_ Client DOB: \_\_\_/\_\_\_/\_\_\_

Gender: \_\_\_ Nicotine Use: Yes \_\_\_ No \_\_\_

Client Name: \_\_\_\_\_ Client State: \_\_\_\_\_ Client DOB: \_\_\_/\_\_\_/\_\_\_

Gender: \_\_\_ Nicotine Use: Yes \_\_\_ No \_\_\_

**Death Benefit and Premium Information (CHOOSE ONE):**

What is the amount of Death Benefit desired? \$ \_\_\_\_\_

OR Solve for Death Benefit by Target Premium\*\* of: \$ \_\_\_\_\_ a month

OR Solve for Minimum DB/Maximum Cash Value with a monthly premium of: \$ \_\_\_\_\_

**Case Design:**

Pay Premium until age: \_\_\_\_\_

Illustrate income using tax-free loans at age: \_\_\_\_\_

If child policy, illustrate tax-free loan for college?: Yes \_\_\_ No \_\_\_

Please provide any additional information on the client's objectives:

\_\_\_\_\_  
\_\_\_\_\_

\*\* Target Premium is what your commission % is based upon.

\* PLEASE ALLOW 48 HOURS FOR EQUIS ADVANCED TO RETURN ILLUSTRATIONS.

## ADDITIONAL CLIENT COVERAGE

1. If for some reason this policy does not get issued, what else do you have in place to protect your family? (i.e., other life insurance policies, annuities, retirement plans, college plans, savings, brokerage accounts, etc.)

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2. Do you participate in a retirement plan at work? (401k, SIMPLE IRA, etc.)

How much do you contribute? (Month or Pay Period) \_\_\_\_\_

Do you get any match from your employer? How much? \_\_\_\_\_

3. Do you have an IRA? (Traditional and/or Roth) \_\_\_\_\_

Where do you have it invested? (Bank, Brokerage Firm, Mutual Fund) \_\_\_\_\_

Are you currently contributing to your IRA? (Traditional and/or Roth) \_\_\_\_\_

4. Do you own any annuities? \_\_\_\_\_

5. Do you feel confident you will have enough money to retire? \_\_\_\_\_

Would you like some help to see how you can get there without a lot of guesswork? \_\_\_\_\_