

PlanFacts : Annuity Strategies

Collection Date:

Client A

First Name Last Name Birth Date
 Male Female Retirement Age Married

Client B

First Name Last Name Birth Date
 Male Female Retirement Age

Street Address City State Zip

Home Phone Work Phone Email Address

Annuity Information

Annuity Name Current Balance

Cost Basis Annual Deposits

Annual Interest Rate % change to % at age

Deposits Continue Until Age

Beneficiary Information

Divide equally among all beneficiaries? Yes No

First Name	Date of Birth	Percent of Plan

Total: % (must equal 100%)

Other Assets and Existing Life Insurance Policies

Total of Other Assets in the Estate: Growth Rate: % (cannot exceed 8%)

	Client A	Client B	Survivor
Insurance Included in Estate	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Insurance in Trust Outside Estate	<input type="text"/>	<input type="text"/>	<input type="text"/> %

Distribution Information

Amount _____

Increase Annually by _____ %

Distribution Start Age _____

Distribution Continue for _____ years

Assumptions

IRD Tax Rate: _____ %

Client A Dies at Age _____

Years Between Deaths _____ years

Notes
