

# Request For Annuity Max Quote

Date: \_\_\_\_\_

Agent: \_\_\_\_\_ Email/Phone: \_\_\_\_\_

Client name: \_\_\_\_\_ State: \_\_\_\_\_

DOB: \_\_\_\_\_ Smoker: \_\_\_ Non-smoker \_\_\_ Rating: \_\_\_\_\_

Spouse name: \_\_\_\_\_

DOB: \_\_\_\_\_ Smoker: \_\_\_ Non-smoker \_\_\_ Rating: \_\_\_\_\_

Annuity amount: \$ \_\_\_\_\_ Cost basis: \$ \_\_\_\_\_

Projected growth rate of annuity: \_\_\_\_\_%

Total estate value: \$ \_\_\_\_\_

Current income tax rate: \_\_\_\_\_% Projected income tax rate: \_\_\_\_\_%

Projected estate tax rate: \_\_\_\_\_% Projected growth rate of estate: \_\_\_\_\_%

Objective:

Maximize guaranteed death benefit to heirs: \_\_\_\_\_

Pass on current annuity value and create immediate income: \_\_\_\_\_

Target a death benefit and create immediate income: \_\_\_\_\_

What is the target death benefit? :\$ \_\_\_\_\_

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**Fax To**  
**The Producers Firm**  
**860-584-8462**