

Request For Income / IRA Max

Date: _____

Agent: _____ Email/Phone: _____

Client name: _____

DOB: _____ Smoker: ___ Non-smoker ___ Rating: _____

Spouse name: _____

DOB: _____ Smoker: ___ Non-smoker ___ Rating: _____

IRA: _____ OR Annuity: _____

Annuity amount: \$ _____ Cost basis: \$ _____

Projected growth rate of annuity / IRA: _____%

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/IRA value and create immediate income: _____

Target a death benefit and create immediate income: _____

What is the target death benefit? :\$ _____

Fax To
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860-584-8462