

# CAR | ANNUITY FACT FINDER

**Please include the most current annuity statement.** To get started with an Annuity CAR review, complete and submit this fact finder sheet along with the most recent annuity statement. The Annuity CAR report is designed to provide an understanding of a current policy and evaluate appropriate alternatives and options.

## FINANCIAL PROFESSIONAL INFORMATION

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Did you write the current annuity:  Yes  No

Are you the servicing professional on this annuity:  Yes  No

## CLIENT/CURRENT ANNUITY INFORMATION

Trust/Entity Owned:  Yes  No

Owner/Annuitant 1: \_\_\_\_\_ DOB: \_\_\_\_\_ State of Sale: \_\_\_\_\_

Owner/Annuitant 2: \_\_\_\_\_ DOB: \_\_\_\_\_ Issue Date: \_\_\_\_\_

Company/Carrier: \_\_\_\_\_ Product Name: \_\_\_\_\_

Product Type:  Variable Annuity  Fixed Index Annuity  Fixed Annuity

Accumulation Value: \_\_\_\_\_ Surrender Value: \_\_\_\_\_ MVA Adjustment: \_\_\_\_\_

M&E Fee: \_\_\_\_\_ Subaccount Fee: \_\_\_\_\_

Current Death Benefit Value: \_\_\_\_\_

## ANNUITY GOALS

Current Annuity:  Qualified  Non-Qualified

Original Goal of Current Annuity:  Lifetime Income Potential  Accumulation and Growth  
 Enhanced Death Benefits  Long-Term Care  Other

Has the goal of this annuity changed from its original goal:  Yes  No

If yes, new goal:  Lifetime Income Potential  Accumulation and Growth  Enhanced Death Benefits  
 Exit/Leave to Heirs  Other

*Income Rider Details - Required information if there's an income rider on the current annuity policy.  
 (May need to contact current carrier to obtain information.)*

## RIDER DETAILS

Riders on Current Annuity: \_\_\_\_\_

Current Income Rider Account Value: \_\_\_\_\_

Current Roll-up Rate: \_\_\_\_\_ %  Simple  Compound

Age the income is anticipated to be turned on: \_\_\_\_\_

The income payout percentage at that age: \_\_\_\_\_ %  Income is Level  Increasing

Single or Joint Income: \_\_\_\_\_

Enhanced Payouts for LTC or ADL Based Needs:  Yes  No If yes: \_\_\_\_\_ % increase

Rider Annual Fee: \_\_\_\_\_