

Sample Information

Please note that this sample information is for demonstration purposes only and is not intended to be used to advise or sell a product to a potential customer.

Income Annuity Survey

Income Annuity Survey Details	
Prepared By	Champion Agency Inc
State of Residence	New Mexico
State of Issue	New Mexico
Owner	Valued Client 65
Name	Client
Birth Date	January 14, 1955
Sex	Male
Annuity Type	Single Life
Fund Type	Non-qualified
Guarantee Type	Installment refund
Premium	\$100,000.00
Cost Basis	\$100,000.00
Purchase Date	January 14, 2020
Payment Frequency	Monthly
Income Start Date	February 14, 2020
Return of Premium before Income Start Date	No
Filter	CHAM: Champions Top Carriers

Financial Institution	Monthly Income	Monthly Taxable Portion	Guaranteed To End Of	Notes
North American Company for Life and Health Insurance	\$486.46	\$127.94	JAN-21-2020	See below
Penn Mutual Life Insurance Company	\$475.78	\$121.80	JAN-28-2020 16:00	
Protective Life Insurance Company	\$475.46	\$121.29	JAN-28-2020	
AIG	\$472.83	\$118.68	JAN-28-2020	See below
American National Insurance Company	\$465.82	\$111.80	JAN-21-2020	See below
Principal Financial Group	\$463.06	\$108.82	JAN-23-2020	See below
The Lincoln National Life Insurance Company	\$462.99	\$108.80	JAN-28-2020	See below
Minnesota Life Insurance Company - A Securian Co.	\$462.48	\$108.22	JAN-28-2020	See below
Integrity Life Insurance Company (W&S)	\$455.60	\$101.14	JAN-21-2020	See below
Pacific Life Insurance Company	\$451.46	\$105.64	JAN-28-2020	See below
Mutual of Omaha Insurance Company	\$449.03	\$103.20	JAN-21-2020	
Global Atlantic - Forethought Life Insurance Company	\$425.33	\$83.36	JAN-28-2020	See below

Financial Institution	Notes
AIG	Minimum owner issue age is 18, or if earlier, the age of majority as defined by law in state of issue.
	Non-qualified purchases by non-natural entities require approval from the Home Office on a case-by-case exception basis and must have a minimum premium of \$150,000 in order to be considered.
	Additional features are available, such as: commutation withdrawal benefits; a variety of payment increase options; and the ability to

	customize ownership and payee structure. For more information, contact your AIG Annuities wholesaler.
American National Insurance Company	Product offers liquidity options and other features, subject to availability.
Global Atlantic - Forethought Life Insurance Company	Product offers liquidity and other features, subject to availability. For more information, please contact the Sales Desk at: Broker Dealer (877)454-4777, IMO (855)447-2537.
Integrity Life Insurance Company (W&S)	Income payments continue for the longer of (1) the life of the annuitant, and (2) until the sum of income payments made is equal to the premium paid. Any remaining guaranteed income payments will be paid to the owner if living, otherwise to the beneficiary as described in the contract on the same installment schedule until the premium is refunded.
	This product offers additional features, subject to availability, such as emergency liquidity, increasing payment options, and non-spousal and multi-generational payouts. For more information, please contact your Integrity representative.
Minnesota Life Insurance Company - A Securian Co.	Product provides one-time access to a portion of future income via the Advance Withdrawal Benefit, available with all annuity income options that include a Period Certain.
North American Company for Life and Health Insurance	For more information, please contact our North American Sales Desk at (866) 322-7066.
Pacific Life Insurance Company	Product offers flexible premium, liquidity options, annual increases to manage inflation, and other features, subject to availability. For more information please contact our Sales Desk at 800-722-2333.
Principal Financial Group	Includes a withdrawal benefit. See quote for details.
The Lincoln National Life Insurance Company	This quote is based on an estimated issue date of January 28, 2020. The actual contract issue date may differ and may affect the value of the quote.
	Lincoln requires the owner(s) to be the annuitant(s) except for non-naturally owned contracts.
	Please verify with the Lincoln Home Office that the current rate scale is illustrated.

Financial Institution	Reasons For Not Quoting
EquiTrust Life Insurance Company	Not active for installment refunds.
Nationwide Life Insurance Company	Not active for installment refunds.
Sagicor Life Insurance Company	Not active for installment refunds.

Survey Notes
Income received in excess of the investment in the contract is taxable as ordinary income.

The content of this page may not be adequate to fulfill the policy application process for some carriers, which require an illustration. This can be obtained by clicking on the carrier name.