

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	Booth Brokerage, LLC
State of Residence	Vermont
State of Issue	Vermont
Owner	Valued Owner
Name	Valued Client
Birth Date	February 26, 1954
Sex	Male
Annuity Type	Single Life
Fund Type	Non-qualified
Guarantee Type	Certain period
Premium	\$100,000.00
Cost Basis	\$100,000.00
Purchase Date	February 26, 2019
Payment Frequency	Annual
Income Start Date	February 26, 2020
Certain Period	Life Only
Return of Premium before Income Start Date	No
Filter	044: BBLLC
Rating Company:	A.M. Best
Rating Level:	All

Financial Institution	Annual Income	Annual Taxable Portion	Guaranteed To End Of	Notes	Rating
Minnesota Life Insurance Company - A Securian Co.	\$6,978.68	\$1,849.35	MAR-12-2019	See below	A+
Mutual of Omaha Insurance Company	\$6,898.78	\$1,770.57	MAR-05-2019		A+
American National Insurance Company	\$6,869.00	\$1,737.86	MAR-05-2019	See below	A
The Lincoln National Life Insurance Company	\$6,819.52	\$1,691.24	MAR-05-2019	See below	A+
Symetra Life Insurance Company	\$6,787.10	\$1,662.84	MAR-08-2019	See below	A
Integrity Life Insurance Company (W&S)	\$6,655.45	\$1,524.10	MAR-05-2019	See below	A+
AIG	\$6,554.97	\$1,428.98	MAR-12-2019	See below	A
Global Atlantic - Forethought Life Insurance Company	\$6,533.82	\$1,457.04	MAR-12-2019	See below	A

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)	IncomeSource® offers an optional increasing payout from 1% to 5% and a wide range of payouts, including Cash Refund and Temporary Life. Subject to limitations and availability.
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.
Symetra Life Insurance Company	Inflation Options: Fractional COLA percentage options that can range from 0.10% to 6.50%.
	Access: 1. Advance Access, subject to state availability, comes standard with all payout options (e.g., life, joint life, period certain). Permits client access to up to 30% of the value of future payments (minimum of \$5,000), available 36 months after purchase, and can be accessed as frequently as every 36 months during life expectancy, or the length of the certain period, as applicable.
	Access: 2. Optional commutation to beneficiary, subject to state availability, gives beneficiary option to convert any remaining guaranteed payments into a single lump sum payment based on present value.
	For information or illustrations, contact our Sales Desk at 1-800-706-0700.
The Lincoln National Life Insurance Company	This quote is based on an estimated issue date of March 5, 2019. The actual contract issue date may differ and may affect the value of the quote.

Financial Institution	Reasons For Not Quoting
Protective Life Insurance Company	Certain period is too short.

Survey Notes
Income received in excess of the investment in the contract is taxable as ordinary income.
When the Certain period is none, there is no death benefit after payments begin.

Prepared by CANNEX on February 26, 2019 at 11:40:46 ET.
This information is current as of the date and time posted and is subject to change without notice.
© Copyright 2019 CANNEX Financial Exchanges Limited. All rights reserved.
CANNEX Request: B83303