

Annuity Policy Review (APR) Fact Finder

An Annuity Policy Review (APR) is designed to analyze your clients' current in-force annuities and provide you with an understanding of your clients' current plans, allowing you to evaluate appropriate options. The information below is necessary for a complete review of your clients' current policy and to help us determine the best possible options to consider.



PRODUCER INFORMATION

Name:	Phone Number:	Email Address:
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CLIENT | POLICY INFORMATION

Owner 1:	Date of Birth:	State of Sale:
Owner 2:	Date of Birth:	
Annuitant 1:	Date of Birth:	
Annuitant 2:	Date of Birth:	
Current Annuity Policy Number:		Issue Date:
Company:	Policy Type: ☐ Variable Annuity (VA) ☐ Fixed Annuity (FA) ☐ Fixed Index Annuity (FIA)	

ORIGINAL POLICY DESIGN

Premium:	Source of Funds: ☐ Qualified ☐ Non-Qualified	
Fees? ☐ Yes ☐ No	Income Rider? ☐ Yes ☐ No	
Original Purpose of Annuity:		
Financial Experience: ☐ Limited ☐ Good ☐ Extensive	Annual Income:	
Federal Tax Bracket: ☐ 25% and under ☐ 28% - 35% ☐ 39.6%	Assets:	
Risk Tolerance:	Time Horizon:	Liquid Net Worth:
Financial Objectives:		

Contact CBS Brokerage at 763.450.1870 for more information.



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