Annuity Review Worksheet

YOUR INFORMATION

Name: _____ Date: _____

Phone: _____ Age: _____

Email: _____

1 | Why did you purchase this annuity?

_____

_____

2 | The annuity you already own

Issue Date: _____

Insurance Company: _____

AM Best Rating: _____

Product Name: _____

Statement Date: _____

Current Contract Value: _____

Amount Available Penalty-Free: _____

Current Interest Rate / Caps: _____

Section Notes

_____

_____

_____

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Analysis & Recommendation

3 | The Cost of Making a Change

Surrender Charges & MVA: _____

Net Surrender Value: _____

Surrender Charge Period Ends: _____

Notes

_____

_____

4 | Know What You Could Be Giving Up

Guarantees

Income Benefits

Death Benefits

Crediting Method

Notes

_____

_____

5 | Compare Before You Replace

What would a new annuity provide?

What are the costs before and after replacement?

Does the change improve your situation?

Notes

_____

_____

RECOMMENDATION

[ ] Keep Current Annuity

[ ] Review Again

[ ] Consider Replacement

Reason for Recommendation: