Clear Form

exclusive INSURANCE BROKERAGE

Annuity Intake

Annuity Intake Form for Application Pre Fill

Agent:		Date:	

This annuity intake gathering form will help us prefill the annuity application to completion.

Full Legal Name:		Gender :	-
Date Of Birth:		Social Security No.:	
Primary Phone:		Email Address:	
Street Address:		City, State, Zip:	
Driver's License#:		Expiration Date:	
Resident State:		US Citizenship:	☐ Y | N ☐

Beneficiaries

Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	
Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	
Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	
Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	
Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	
Full Legal Name:		Percent:	
Relationship:		Type:	☐ Primary | Contingent ☐
SSN | TaxID:		DOB | Established:	

***Note additional beneficiaries in the overflow section**

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Employment & Suitability

☐ Employed	☐ Self Employed	☐ Unemployed	☐ Retired
☐ Homemaker	☐ Disabled	☐ Student	Tax Rate: _ %

Retirement Age:		Occupation:	

Select All Sources Of Income That Apply

☐ Salary/Wages	☐ Social Security	☐ 403(B)	☐ 401K | Pension
☐ Inheritance/Gifts	☐ Non-Qualified Investments	☐ Qualified Investments	☐ Sale of Business or Property

$	Total Monthly Household Income
$	Total Monthly Household Expenses
$	Total Household Debt (Not Including Primary Residence or Vehicles)

Liquid Assets		Non-Liquid Assets	
$	**Checking | Savings | Money-Market**	$	**Home Equity**
$	**Individual Retirement Accounts (IRAs)**	$	**Total Cash Value of Life Insurances**
$	**Certificates of Deposit (CD's)**	$	**Real Estate Equity (Not Personal Residence)**
$	**Non-qualified Brokerage Accounts**	$	**Annuities Inside Surrender**
$	**TSP**	$	**Personal Property**
$	**401K**		
$	**Cash | Precious Metals**		
$	**Total Annuities Outside of Surrender**		

Direct Deposit & Tax Withholdings

Bank Name:		Type:	☐ Checking | Savings ☐
ABA Routing #:		Account #:	
Transaction Amt:	$	Frequency:	
Delivery Method:	☐ Mail Check ☐ ACH ☐ Wire	Tax Withholdings	% State | % Fed
Account Owner:		Other Name (s):	

Overflow | Notes