



# Fixed Annuity Selector

As you begin the process of planning your clients' retirement income, this annuity selector form will help you gather pertinent information about their goals. This questionnaire is a starting point, meant to help you determine the appropriate fixed annuity options for your clients, and then generate illustrations and product information accordingly.

Client Name \_\_\_\_\_ State of Residence \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender: ☐ Male  
☐ Female

Spouse's Name \_\_\_\_\_

Date of Birth \_\_\_\_\_ Gender: ☐ Male  
☐ Female

Premium Type: ☐ Qualified ☐ Non-Qualified Premium Amount \_\_\_\_\_ Additional Contributions \_\_\_\_\_

Preferred Rate Type: ☐ Fixed Rate ☐ Index Based Primary Objective: ☐ Accumulation  
☐ Income  
☐ Wealth Transfer  
☐ LTC

What (if any) is the need for annual access to a percentage of the account value? \_\_\_\_\_

Is income the primary goal? ☐ Yes ☐ No If yes, in how many years will distributions begin? \_\_\_\_\_

For payments within year one, would an immediate annuity be an option? \_\_\_\_\_

What is most important: ☐ Guarantees  
☐ Potential Performance Assumptions

Income Preference: ☐ Lifetime Income ☐ Single Life ☐ Level Payment  
☐ Select Period ☐ Joint Life ☐ Increasing Payment  
*If select period is chosen, how many years?* \_\_\_\_\_

Are there any health issues or additional concerns?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Contact [mark@insurancemarketplacellc.com](mailto:mark@insurancemarketplacellc.com) with additional questions or for more information regarding fixed annuities.



913-777-1132 or 833-INS-MKPL

