

## Annuity Illustration Request Form

Broker: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_

### Annuitant's Information

Annuitant's Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Joint Annuitant's Name: \_\_\_\_\_ DOB: \_\_\_\_\_

State of Residence: \_\_\_\_\_

### Plan Details

Type of Annuity:  SPDA  SPIA  FPDA  Equity IA  Other: \_\_\_\_\_

Preferred Carrier(s), if Known: \_\_\_\_\_

How to Solve:  Life Only  Life with Period Certain  Cash Refund  Other: \_\_\_\_\_

Amount of Deposit: \$ \_\_\_\_\_

**OR**

Modal Amount Required: \$ \_\_\_\_\_ Mode:  Annual  Semi-Annual  Quarterly  Monthly

### Additional Remarks

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**Please send your completed request to Jenny Ausman**

[jenny@simondavisinc.com](mailto:jenny@simondavisinc.com) ♦ fax: 303.860.8956 ♦ phone: 303.633.5912

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