

CUSTOM ANNUITY

POLICY REVIEW

FACT SHEET

Advisor:

Company:

Annuitant:

Owner:

Issue Date:

Contract Number:

Cash Value:

Account Type (Non-qualified - IRA, 401(k), etc.):

Income Value:

Cost Basis:

Death Benefit:

Surrender Value:

Original Purpose of the Annuity:

How have your financial priorities changed since you bought it?

To complete the report, please provide a complete copy of the of the client's most recent variable annuity statement.