

Pinnacle Annuities

Annuity Appraisal

Prepared for: _____

Prepared by: _____

Firm: _____

Proposal date: _____

Valid through: _____

Client Information

Name: _____

Age: _____

Goals: _____

Birth date: _____

Surrender Details

In surrender:

Date of surrender : _____

	Your Current Policy	Pinnacle Proposal
Carrier:		
Product Name:		
Product Type:		
Tax Status:		
Issue Date:		
Account Balance:		
Benefit Base:		
Payout Amount:		
Payout Rate:		
Death Benefit:		
Enhanced Death Benefit <i>(if applicable)</i> :		
Advisory Fees:		
M&E Fee:		
Rider Fee:		
Subaccount Fees:		
Total Cost:		

Pinnacle Annuities

Annuity Analysis & Proposal

Cost Analysis:

Benefit Analysis:

Pinnacle Annuities Recommends: