

PRODUCER ANNUITY CONTRACT DELIVERY CHECKLIST

- ☐ I have a written fact-finder with information and reasoning that substantiates this sale.
- ☐ I have written documentation of the client's expenses, income needs, liquid assets, goals.
- ☐ Is the correct OWNER named?
- ☐ Is the correct ANNUITANT named?
- ☐ Is the correct BENEFICIARY named?
- ☐ Is the correct PREMIUM listed?
- ☐ Is the correct TAX STATUS indicated?
- ☐ Is the correct ISSUE DATE listed?
- ☐ Is the correct INDEX STRATEGY elected?
- ☐ Is the correct RIDER(s) elected?
- ☐ Is the correct CAP, PAR. RATE, FEE, and/or SPREAD listed?
- ☐ Is the correct SURRENDER CHARGE schedule listed?
- ☐ Is the correct BONUS recapture schedule listed?