



# INSURANCE AGENT (PRODUCER) DISCLOSURE FOR ANNUITIES

**Do Not Sign Unless You have Read and Understand the Information in this Form.**

Date:

## INSURANCE AGENT (PRODUCER) INFORMATION ("Me", "I", "My")

First Name:

Last Name:

Business/Agency Name:

Business Mailing Address:

Business Telephone Number:

Email Address:

National Producer Number:

Agent Number:

## CUSTOMER INFORMATION ("You", "Your")

First Name:

Last Name:

## What Types of Products can I Sell You?

I am licensed to sell annuities to You in accordance with state law. If I recommend that You buy an annuity, it means I believe that it effectively meets Your financial situation, insurance needs, and financial objectives. Other financial products, such as life insurance or stocks, bonds and mutual funds, also may meet Your needs. I offer the following products:

- Fixed for Fixed Indexed Annuities
- Variable Annuities
- Life Insurance

I need a separate license to provide advice about or to sell non-insurance financial products. I have checked below any non-insurance financial products that I am licensed and authorized to provide advice about or to sell.

- Mutual Funds
- Stocks/Bonds
- Certificate of Deposits

## Whose Annuities Can I Sell to You?

I am authorized to sell:

- Annuities from Only One (1) Insurer     Annuities from Two or More Insurers
- Annuities from Two or More Insurers although I primarily Sell Annuities From:

**How I'm Paid for My Work:**

It's important for you to understand how I am paid for my work. There is no charge to you. The insurance company will pay me a commission for the sale of this annuity. I may also receive non-cash compensation in the form of an incentive trip based on annual sales production.

**If you have any questions about anything in this document, please ask me.**

By Signing below, You acknowledge that You have read and understand the information provided to You in this document.

\_\_\_\_\_  
Signature of Owner (s)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Signature of Joint Owner (if applicable)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Agent Signature

\_\_\_\_\_  
Date Signed