

Product Details

Process Overview

Personal Information



Driver's License



Beneficiaries



Financial Overview



Funding Source



Review



Save and Exit

Cancel Application

Overall Progress 0%

YOUR PERSONAL INFORMATION

*Required

First Name*

Last Name*

Address Line 1*

Address Line 2

City*

State* 

New Jersey 

Zip Code*

Phone Number*

Email Address*

jsf@gmail.com

Social Security Number*



Birthdate*

MM/DD/YYYY

Gender Identification*

Select Gender 

Residency Status*

Select Status 

Marital Status*

Select Status 

 Add Joint Owner

Continue

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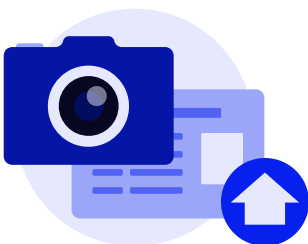
Overall Progress 16%

Driver's License

A copy of the front of your government-issued driver's license is required for proof of identity.

You can take a photo of your license with the camera on your phone, computer, or tablet. You can also choose to upload an existing photo of your license from your device.

YOUR FRONT DRIVER'S LICENSE



Drag and drop photo to upload or click here to choose a file

Using your phone to take a photo of your license?

We can email you a link, so you can easily upload the picture of your driver's license right from your mobile device.

 [Email me the link](#)

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Overall Progress 34%

Beneficiaries

If you pass away during the contract term, your beneficiary will receive the accumulated value of your annuity. If you have more than one beneficiary, each will receive an equal amount of funds from your account unless you adjust your allocations.

Please designate whom you'd like your primary beneficiary or beneficiaries to be. At least one primary beneficiary is required.

Primary Beneficiaries

+ Add Primary Beneficiary

Contingent Beneficiaries (optional)

If your primary beneficiaries have passed away, your contingent or secondary beneficiaries will receive the value of the annuity.

+ Add Contingent Beneficiary



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Beneficiaries



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Overall Progress

34%

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Add Primary Beneficiary



Individual

Trust

First Name*

Last Name*

*Required

Relationship*

Select Relationship



Birth Date*

MM/DD/YYYY

Gender Identification*

Select Gender



Social Security Number

Including a SSN helps us locate your beneficiaries more quickly.

Phone Number

☐ My beneficiary has the same address as me.

Address Line 1

Address Line 2

City

State

Select State



Zip Code

Add Primary Beneficiary

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Overall Progress

34%

Beneficiaries

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Add Contingent Beneficiary

Add Primary Beneficiary



Individual

Trust

Trust Name*

Trust Type*

*Required

Select Type



Taxpayer Identification Number*

Date of Formation*

MM/DD/YYYY

Please enter a SSN for a revocable trust or an EIN for an irrevocable trust.

Add Primary Beneficiary

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Overall Progress50%

Financial Overview

Provide financial estimates and suitability information. This is required by the insurance company to ensure that an annuity is a good financial decision for you.

Household cashflow

*Required

Monthly Gross Household Income*

\$

Monthly Household Expenses*

\$

Need help? [Here's a calculator that might help.](#)

Household assets

LIQUID ASSETS

Please note that you must have at least 50% in additional liquid funds available on top of the annuity investment amount. For example, if you are applying for an annuity with an investment amount of \$50,000, you will need to have at least \$75,000 in liquid assets.

Checking and Savings*

\$

CDs*

\$

Stocks and Bonds*

\$

Money Market*

\$

Retirement Savings*

\$

IRA, 401(k), Qualified Plans (if over the age of 59½)

Mutual Funds*

\$

Except Class B funds subject to deferred sales charges

Life Insurance Cash Value*

\$

Not subject to surrender penalties

Annuities*

\$

Not subject to surrender penalties

NON-LIQUID ASSETS ⓘ

Value of Home*

\$

Value of Other Real Estate*

\$

Retirement Savings*

\$

IRA, 401(k), Qualified Plans (if under the age of 59½)

Mutual Funds*

\$

Class B funds subject to deferred sales charges

Other Valuable Personal Property*

\$

Gold, art, antiques, collectibles, etc.

Annuities*

\$

Subject to surrender penalties

Life Insurance Cash Value*

\$

Subject to surrender penalties

Debts

Mortgages*

\$

Loans*

\$

Credit Card Debt*

\$

Total Net Worth

\$0

Suitability questions

Employment Status*

Select Status

Federal Income Tax Rate*

Select Rate

What's are your current sources of income?*

Select all that apply

- ☐ Social Security
- ☐ Salary/Wages
- ☐ Pension
- ☐ Retirement
- ☐ Rental income
- ☐ Investments
- ☐ Dividends
- ☐ Other

What is your risk tolerance?*

- ☐ Conservative
- ☐ Moderately conservative
- ☐ Moderate
- ☐ Moderately aggressive
- ☐ Aggressive

What's your financial objective for this annuity?

Select all that apply

- ☐ Safety of principal and growth
- ☐ Guaranteed income
- ☐ Retirement security
- ☐ Longevity insurance
- ☐ Tax deferral
- ☐ Guaranteed investment return
- ☐ Legacy
- ☐ None of the above

How do you anticipate getting money out of this annuity?

Select all that apply

- ☐ Steady income payments through immediate annuitization ⓘ
- ☐ Steady income payments through future annuitization ⓘ
- ☐ Systematic withdrawals
- ☐ Lump sum withdrawal
- ☐ Traditional IRA required minimum distributions
- ☐ Leave to beneficiaries

Do you currently own any life insurance or annuity contracts?*

Yes

No

Do you currently have a reverse mortgage?*

Yes

No

Will funding your annuity affect your ability to cover day-to-day expenses or unforeseen events/emergencies in the near future?*

Yes

No

Have you exchanged or replaced any life insurance or annuity contracts within the last 5 years?*

Yes

No

Is your purchase of an annuity intended to replace an annuity or life insurance policy you currently have?*

Yes

No

Do you anticipate any significant changes in your financial affairs?*

Yes

No

Do you reside in a nursing home or assisted living facility?*

Yes

No

Are you currently receiving Medicaid or planning to receive it after the purchase of this annuity?*

Yes

No

Are you aware of any health conditions that might shorten your lifespan?*

Yes

No

Are you currently eligible for an employer-sponsored retirement plan offering a company match?*

Yes

No

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Overall Progress 66%

Funding Source

How would you like to fund your annuity? You can choose one or multiple funding sources. At least one funding source is required.

Funds will not be transferred out of your account(s) until your application has been reviewed, signed, and processed by the insurance company.

+ Add a Funding Source



Continue