



## ANNUITY MAXIMIZATION STRATEGY

How to significantly increase the value of an Annuity to children, grandchildren and/or favorite charity.

### IDEAL PROSPECT FOR ANNUITY MAXIMIZATION STRATEGY

- Over age 59 ½
- Does not need the annuity to maintain lifestyle
- Insurable

### FACTS OF THE CASE:

Client/Clients Vitals \_\_\_\_\_

Current Annuity Value \_\_\_\_\_

Annuity Basis \_\_\_\_\_

Annuity assumed growth rate \_\_\_\_\_

Client/Clients tax rates \_\_\_\_\_

Do the client/clients need any of the annuity value or its earnings to maintain their lifestyle?

\_\_\_\_\_

<b>PRESENTATION</b>	<b>Current</b>	<b>Annuity Max</b>
Current Value of Annuity	_____	_____
Annuity Basis	_____	_____
Annuitized Amount	_____	_____
Annual Annuitized Income	_____	_____
Projected Tax on Annuitized Amount	_____	_____
After Tax Income	_____	_____
Projected Annuity Value Year 10	_____	_____
Projected Annuity Tax Year 10	_____	_____
After Tax Value of Annuity Year 10	_____	_____
Life Insurance Premium	_____	_____
Life Insurance Proceeds	_____	_____
Projected Total Value Transferred At Death	_____	_____

### OVERVIEW ITEMS

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