

Winning Points Advisors, LLC

www.thewinningpoints.com 800-950-9112 cstoll@thewinningpoints.com

Call or E-mail us with questions, we might be able to help!

Fixed Index Annuity Data Sheet

Company: Phone: Website:

Product Name: Contract Date:

Contract # Deposit:

Agent Information

Name: Firm:

Phone: E-mail:

Contract Details

Source of funds:

Reason for purchase:

Special desires for the money:

IRA? (Y/N): Cost Basis:

Owner: Contingent Owner:

Annuitant: Contingent Annuitant:

Beneficiary: Contingent Beneficiary

Date Surrender Charges end: Date Bonus Recapture Ends:

Login Username/ Website Clue to remind you of Password: /

Contract Termination Date Why?/Use of Funds?

Notes

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Instructions

Thanks for using our form to keep track of your annuity information. This form can be used with any annuity. Fill out one form for each contract. It contains most of the information you will need to manage and evaluate your investment in this insurance contract. The more you put in the better it is for you and your loved ones. Call on us if we can help! We suggest that you keep this form with the contract and the annual statements.

Some hints to get more out of this form

- ➔ Get your agent to fill it out for you, they will know this stuff better and be able to do it faster than you will anyway!
- ➔ In the “Reason for Purchase” section- put in there why you chose this product or type of policy. Answers like safety, income, or “my advisor suggested it,” are common here. This helps you remember, years from now, what you did and why!
- ➔ In the section called “Special Desires for the Money” put what you would like to happen with this money. Putting the grandkids through college, paying for last expenses, or retirement funding are pretty common here. Note: If you want your desires to be enforced talk to your agent/attorney on how to structure the contract to do so. Making notes in this section does not obligate anyone to follow through on your wishes.
- ➔ Beneficiary Section: The beneficiary you select will likely get the money no matter what your will says, so be thoughtful in selecting the right way to leave people money. There are a host of considerations to think about in making this choice. If in doubt, see a lawyer.

Yearly Review Questions

We suggest that you review these questions annually, it only takes a moment!

- Is the company still strong and safe?
- Are they paying interest as they should?
- Does the owner/beneficiary need to be reviewed?
- Have your financial circumstances changed?
- What are the pros and cons of taking money out of the contract?
- Is there a better place for this money?
- Is my agent the best person for the job?
- Are the allocations good?
- Time for another opinion?

More copies of this form and valuable information are available at:

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Performance history

Company:

Contract#:

Deposit:

Contract Date:

	Date	Cash Goes In	Bonus	Interest Earned	Fees	Cash Comes Out	Other	Accumulation Value	Death Benefit	Income Account	Questions*
Year 1											
Year 2											
Year 3											
Year 4											
Year 5											
Year 6											
Year 7											
Year 8											
Year 9											
Year 10											
Year 11											
Year 12											
Year 13											
Year 14											
Year 15											
Year 16											
Year 17											

*Note:

A Short List Of Questions Is On The Instruction Page For You To Ask Yourself Each Year, They Can Be Important! Just Check The Box Each Year To Tell Yourself That You Have Looked Them Over.

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