

# 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:	National Producer State:

## CUSTOMER INFORMATION (“You”, “Your”)

First Name:	Last Name:
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### 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 or 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       Certificates 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'm paid for my work. I am paid a commission by the insurance company. I may also receive an occasional non-cash compensation, such as an overall sales incentive, which is not directly tied to any specific product or sale. There are no other fees paid by You or the insurance company. If You have questions about how I'm paid, please ask Me.

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

_____	_____
Customer Signature	Date
_____	_____
Agent (Producer)	Date