



Looking for Clues

Is An Annuity Right for Your Client?

What might your customers say or do that would indicate they might like a fixed annuity?

• Does not like the ups and downs of the market
• Worries about the safety of their money
• Focuses more on the “return of their money” than on the “return on their money”
• Shops for CD rates
• Complains about current rates
• Hates paying taxes on interest
• Does not spend the interest on their money
• Rolls CDs year after year
• Occasionally withdraws some money from their account
• Wants access to their money but rarely withdraws
• Feels leaving money to family is important
• Is familiar with the pain of probate

Not FDIC/NCUA Insured	No Bank Guarantee
Not A Deposit	May Go Down In Value
Not Insured By Any Federal Government Agency	



WE'LL GIVE YOU AN EDGE®

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RF 1226-3 | #373012011 | 04/2009