

A Guide to See if An Annuity Fits You

(Webster's Definition of an Annuity: "A sum of money payable yearly or at other regular intervals".)

It is important to determine which Strategy or Strategies below; **MAY** fit your financial picture.

1. If you have a lump sum of money, and there is a possibility of outliving your money due to living longer, market losses, or inflation, and you want a **GUARANTEED LEVEL Single or Joint lifetime income, with no losses and to never outlive your retirement money**, Strategy #2 on our website may fit a portion of your financial future.
2. If you have a lump sum of money and want a place to put your money with, **MARKET INDEX GROWTH**, with no losses, and withdrawals as needed up to the allowed amount, then Strategy #3 on our website may fit your financial future.
3. If you have a lump sum of money and you are healthy and could live into or past age 90 or 100, and it is important to have **INCREASING Single or Joint lifetime income with no losses and to keep up with inflation, and to never outlive your retirement money**, then Strategy #4 on our website may fit a portion of your financial future.
4. If you have a lump sum of money and you want a guaranteed Fixed Rate of Return for 3, 5, 7 or 10 Years, then Strategy #5 on our website may fit your financial future, however rates can decrease after the guaranteed term.
5. If you have a need for Cash Value Life Insurance for purposes of the following: **Death Benefit (Income Tax Free), Tax Deferred Growth and Access to Tax Free Cash when needed for purchases or retirement**, then Strategy #6 may fit your financial future.

Please Close this page by clicking the back button & go to the Strategy Boxes that fit you.