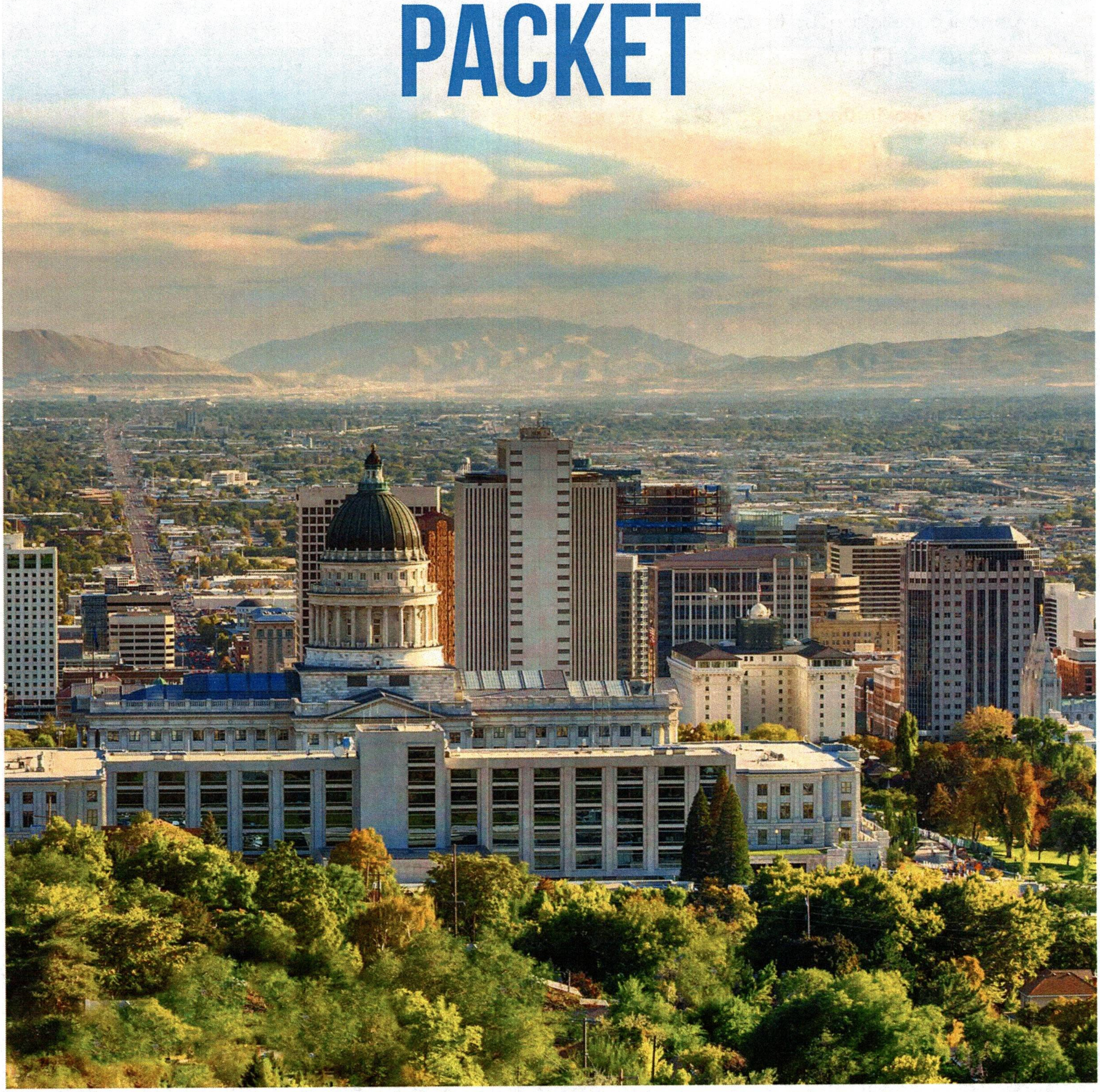
SILAC

INSURANCE COMPANY

ANNUAL REVIEW PACKET



REVIEW QUESTIONS FOR EXISTING SILAC ANNUITY ACCOUNT(S):

Client Name: ______________________________

Are your mailing address and email up to date?

☐ Yes ☐ No

Are your beneficiaries up to date?

☐ Yes ☐ No

Does a POA or Trusted Contact need to be named?

☐ Yes ☐ No

Do you have or need access to the carrier website?

☐ Have Access ☐ Need Access

Life Event Changes in the last 12+ Months?

(Marriage / Death of Spouse / Birth of Children or Grand Children / Assisted Living / Changed Jobs or Retired)

☐ Yes ☐ No

If yes, which life event(s)? ______________________________

Do you hold any investments that no longer align with your current financial needs and/or goals?

☐ Yes ☐ No

Are you aware of annuities that provide accumulation, income potential or a combination of both with no annual fees?

☐ Yes ☐ No

Are you interested in learning more about high volatility & low volatility indices with no downside risk?

☐ Yes ☐ No

Does your current investment portfolio provide a guaranteed lifetime income?

☐ Yes ☐ No

EXISTING ACCOUNTS

	Annuity Contract A	Annuity Contract B	Annuity Contract C
Company			
Contract Number			
Anniversary Date			
Product Type		Variable / Fixed / Indexed	
Tax Qualification		Q / NQ / Roth / SEP	
Product Term			
Initial Premium			
Withdrawals Taken?		None / Income / FWD / RMD / Other	
If yes, Income Amount?			
Upcoming Withdrawals to Schedule			
Interest Credit as of last anniversary			
Additional Rider examples: Care Giver Benefit, Life Event Withdrawal, Enhanced Death Benefit			

FOR FIXED & INDEXED ANNUITIES

Review of all available crediting method(s)	Annuity Contract A	Annuity Contract B	Annuity Contract C
Index Examples: S&P 500, Dow Jones, Nasdaq etc.			
Crediting method Examples: annual point to point, monthly point to point, annual average, etc.			
Current Cap			
Current Participation Rate			
Current Fixed Rate			
If MYGA, Current Fixed Rate			

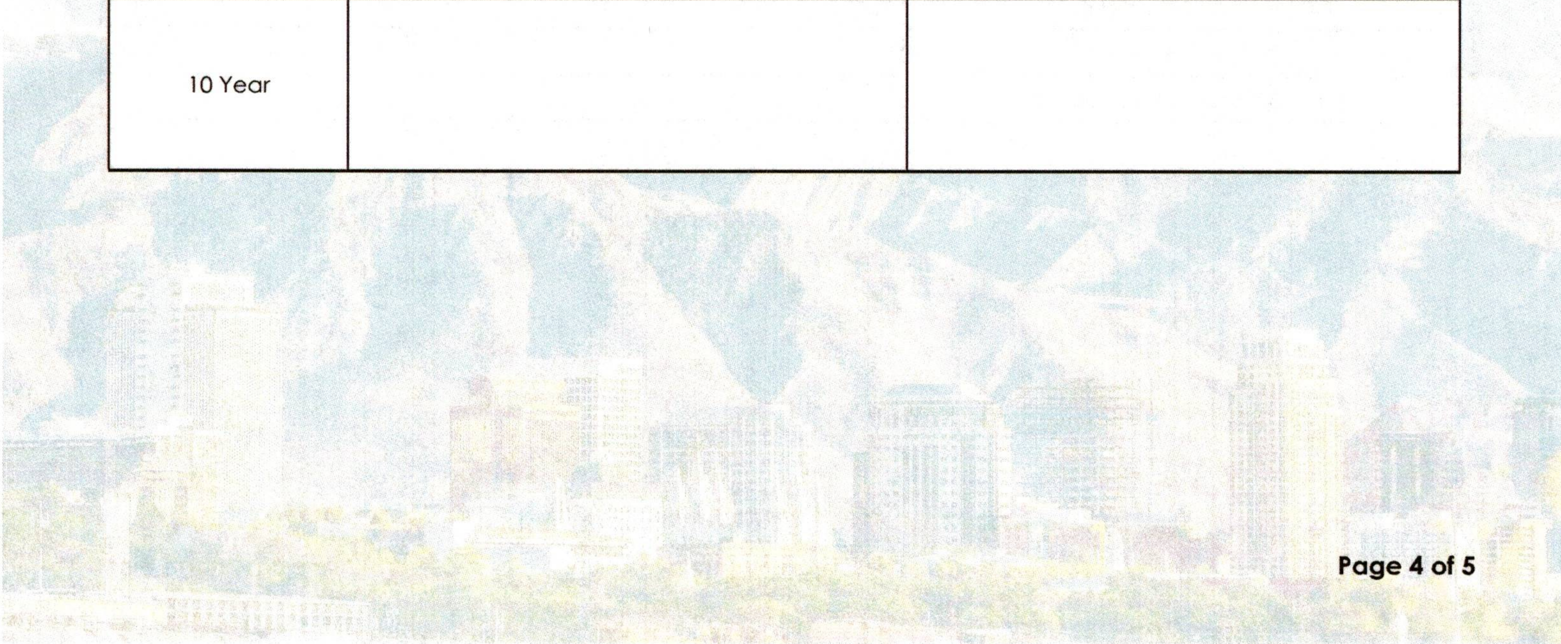
Readily available current account statements from all investments are encouraged while completing this packet

FINANCIAL INVENTORY & GOALS

	Total	Action Required
Annuities	$	
Checking / Savings / Money Market	$	
Pension Plan	$	
Stocks/Bonds/Mutual Funds (or other Securities)	$	
CDs (Less than 1 Year to Maturity)	$	
Annuities that are Surrender Free	$	
Annuity Penalty Free Withdrawals	$	
401k / ROTH / Retirement Plans	$	
Cash Value of Life Insurance	$	
Other	$	

GOALS

	Personal Goals	Financial Goals
1 Year		
5 Year		
10 Year		



NOTES, PROPOSALS & FOLLOW-UP MEETING

NOTES:

AGENT INFORMATION:

Name

Phone

Email

NEXT MEETING DATE:

MM/DD/YYYY