RESURGE
INSURANCE MARKETING

Annuity Questionnaire

Client Name: ____ **Date:** _________________

1. Do you have any retirement accounts such as a 401(k), 403(b) or a Traditional or Roth IRA? If yes, what is the approximate value of the account(s)?

2. Do you have any money in the stock market, mutual funds, bonds, CDs or money market accounts? If yes, what is the approximate value of the account(s)?

3. If yes to 1 and/or 2 – are you happy with the way your money has been performing? Are you paying any asset management fees that are impacting your returns? Our annuity options are 100% free of hidden fees.

4. How much of your money can you afford to lose?

5. Are you concerned about outliving your money?

6. Are you looking to protect your money and draw regular income from it (like a bonus on top of your social security every month) or are you looking to grow your money as much as possible to pass on to the next generation and only use what you need?

7. If I could show you a way to securely grow your money without any downside market risk, while protecting it from Title 19 (nursing home spend-down) and avoid any probate interference, all with NO COST to you, would that be something that would interest you?

8. I will need to take a copy of your most recent statement(s) so my annuity manager and I can work to present you with the best option to safeguard your hard—earned retirement dollars.