



*Life and Health Insurance Brokerage:  
Products, Knowledge, & Service*

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[www.thewebagency.com](http://www.thewebagency.com)

## Single Premium Immediate Annuity

Agent Name \_\_\_\_\_

Fax #: \_\_\_\_\_

Phone #: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Tax Qualified Yes/No

State \_\_\_\_\_ Single or Joint: \_\_\_\_\_

Primary Annuitant \_\_\_\_\_ Sex: M/F DOB \_\_\_\_\_

Secondary Annuitant \_\_\_\_\_ Sex: M/F DOB \_\_\_\_\_

Percentage to Second Annuitant if joint \_\_\_\_\_ %

Benefit Options: Period Certain ( 5-50 years) \_\_\_\_\_

Certain & Life (5,10,15,20,25,30 years) \_\_\_\_\_

Life Only \_\_\_\_\_

Installment Refund \_\_\_\_\_

Mode:      Monthly      Quarterly      Semi-Annual      Annual

Deposit Premium \$ \_\_\_\_\_

OR

Modal Amount Desired \$ \_\_\_\_\_

*“Serving Central New York Brokers Since 1967”*