

Step 5 (continued)

A) Identify Your Appropriate Annuity Payout Option(s)

To determine which annuity payout option might best meet your needs, read the description below and check the box next to the one that is most appropriate to you.

☐ I want the most income I can get for as long as I live.

No one else depends on me financially. When I die, whether it's in 20 days or 20 years, nothing will be left for any beneficiaries.



You've chosen a **Single Life** option.

I also want to take **Systematic/Partial Withdrawal payments**.

☐ Yes ☐ No

☐ I want income for life with at least a certain number of payments.

I know I'll have income for as long as I live. If I die before receiving all of my payments, my beneficiaries are guaranteed to receive the rest.



You've chosen a **Life Annuity with Guaranteed Payments** option.

I also want to take **Systematic/Partial Withdrawal payments**.

☐ Yes ☐ No

☐ I want income for a certain number of years.

Instead of lifetime/long-term income, I know I'll only receive payments for a set number of years. But if I die before I've received all my payments, my beneficiaries are guaranteed to receive the rest.



You've chosen a **Period Certain** option.

I also want to take **Systematic/Partial Withdrawal payments**.

☐ Yes ☐ No

I want to receive income for \_\_\_\_\_ number of years.

☐ I want income for as long as my beneficiary and I live.

I know we will have guaranteed income as long as we live, even if one of us dies. But once we pass away, there will be nothing left for any other beneficiaries.



You've chosen a **Joint & Survivor** option.

I also want to take **Systematic/Partial Withdrawal payments**.

☐ Yes ☐ No

Intended Beneficiaries:

Age:

Spouse Name: \_\_\_\_\_

Children or Others: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Charities: \_\_\_\_\_

\_\_\_\_\_