

# Annuity Quote Request



Stephens-Matthews  
Marketing, Inc.

## Agent Information:

**Name:**

**Phone:**

**Email:**

**Quote Need By Date:**

## Client Information:

**Name:**

**Sex:**

**D.O.B.:**

**State of Policy Issue:**

**Asset(s) Available for Illustration:**

**Tax Status: (for each asset if more than one listed) Qualified, Nonqualified**

**Special considerations for Assets: (ie surrender charges, taxes etc.)**

**Concept (goal):** Accumulation; Death Benefit; Guaranteed Lifetime Income

**For income desired deferral:**

**Spouse's Age:**

**Annuity Type:** Traditional Fixed; FIA; SPIA; ;

**MYGA**

**Additional notes:**