ANNUITY VERIFICATION

Send To: _____

_____

_____

_____

Applicant/Tenant: _____ Unit #: _____

Soc. Security #: _____

Property Name: _____

Address: _____

_____

Type of Annuity held:
___FIXED ___VARIABLE ___HYBRID ___IMMEDIATE ___LIFE ___OTHER

Date Annuity was issued: _____

Is this the original owner of the Annuity? _____YES ____NO

Total Amount paid into the Annuity by the individual: $_____
Current Value $_____ Cash Value $_____

Annual earnings or interest rate $_____ %_____

Does the holder have access to the funds? _____YES _____NO
What is the surrender fee or withdrawal penalty to covert this asset to cash? $_____

Are regular withdrawals/payments being made? ___YES _____NO
Amount: $_____ Frequency: _____
What is the total amount withdrawn since the contract issue date? $_____

AUTHORIZED SIGNATURE

Print Name: _____ Title: _____

Signature: _____ Date: _____

Telephone: _____

RETURN TO: _____

_____

_____

--OFFICE USE ONLY--

Date Sent: _____

Date Received: _____

Comments: _____

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