



Founded 1954

**APPLICANT SUITABILITY STATEMENT:**

(Please circle Yes or No to the Following Statements)

YES NO I acknowledge that I have read the "Annuity Products Suitability Analysis Form 1330" regarding my financial status. This includes my liquidity needs and I have determined that this annuity is suitable for my specific financial situation.

YES NO I acknowledge that I have reviewed my investment objectives pertaining to this Annuity Application. I have also read and reviewed my objectives regarding the preservation of principal. I have determined that this annuity is suitable for my specific financial situation and Investment objectives.

YES NO I acknowledge that I have reviewed and understand my tax status regarding this Annuity Application. I also understand my objectives regarding tax deferral with this Annuity Application. I have determined that this annuity is suitable for my specific financial situation.

**- OR -**

YES NO I acknowledge that I have elected not to provide information regarding my financial status. Not to provide my investment objectives. Not to provide my tax status and other pertinent information, but have determined that this annuity is suitable for my needs.

\_\_\_\_\_  
Owner Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Owner Signature

\_\_\_\_\_  
Date

**Agent Statement:** If the applicant(s) elected to provide the information described in the suitability statement above, I have determined that this annuity is suitable for the applicant(s)'s specific financial situation and investment objectives.

\_\_\_\_\_  
Agent's Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date