

	Name:	
	Home #:	
	Cell #:	
	Address:	
	Email:	

**What is the main reason you are looking for a new place to put your money?**

**What is your retirement date/goals?**

**Please indicate one response from the selection below that best describes your risk tolerance for this asset:**

- I am NOT comfortable with potential loss of my principal due to market downturns, however, I would be comfortable with the ability to achieve some growth.
- I am comfortable with the potential loss of my principal in an exchange for the opportunity to achieve higher growth and the potential for greater returns.

**Of the statements below, please select the one that best describes your tolerance for risk and potential returns, specifically regarding this asset:**

- I wish to preserve and protect my principal from market downturns.
- I am seeking a stable, consistent rate of return over a specified duration.
- I am seeking a higher rate of return, regardless of the risk of losing my principal.

**Which of the following personal objectives are most important to you?**

- Accumulation of Asset \*\*
- Income – Access to lifetime income or guaranteed payment of income. \*\*\*
- Death Benefit – Leave money to beneficiaries

**\*\*If you selected "Accumulation of Asset," above please mark one of the following responses indicated below:**

- I am seeking returns based on a fixed interest rate and returns are not linked to an index.
- I am seeking returns linked to the performance of one or more indexes.

**\*\*\*If you selected "INCOME" please indicate the anticipated time frame for accessing income (i.e. immediately, 1 year from now, etc.)**

**Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_