



Sample Income Annuity Illustration

Demo Company

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Sample Income Annuity Illustration Layout

Annuitant Details

Primary Annuitant: Fred Client
Gender: Male
Date of Birth: December 30, 1944
Age at Quote Date: 68
State of Issue: California (CA)

Joint Annuitant: Jane Client
Gender: Female
Date of Birth: March 12, 1945
Age at Quote Date: 68
Annuitant Relationship: Married

Income Annuity Details

Annuity Type: Joint Life
Guarantee Type: Certain Period: 10 Years
Fund Type: Non-qualified
Cost Basis: \$100,000.00

Joint Type: Non-reducing
Joint Continuation: 100.000%

Premium & Income Summary				
Premium Amount	Monthly Income Amount	Taxable Amount	Non-Taxable Amount	Exclusion Ratio
\$100,000.00	\$493.79	\$110.61	\$383.18	77.6%

Sample Joint Life with Certain Period disclosure:

Fred Client and Jane Client will receive \$493.79 payments Monthly, assuming a purchase date of March 28, 2013, and an income start date beginning April 28, 2013. This sample is based on a Joint Life with 10 Years Guarantee Period. Scheduled payments are guaranteed to continue for the life of either annuitant. Should one of the annuitants die, the payments are to continue to the surviving annuitant at 100.000% of the original payment amount. In the event that both annuitants die prior to all guaranteed payments being made, scheduled payments will continue to the designated beneficiary until the end of the guarantee period. This quote is guaranteed to the end of April 11, 2013.

This quote is for sample purposes only:

The details and values presented are based on a fictitious company that CANNEX has established strictly for the purposes of demonstrating the structure, flexibility and features of the calculation engine. This illustration sample has been created to provide context as to how the web interface and calculation engine are leveraged and integrated to produce an illustration. Furthermore, this sample is meant to demonstrate the extensive design flexibility that can be employed for illustrations rendered from the CANNEX system (to illustrate an annuity quote). Please be advised that this quote and the values presented have no correlation to actual rates, parameters or performance in the income annuity market.