



Nationwide Life Insurance Company
Nationwide Life and Annuity Insurance Company

Phone: 800-848-6331 • Fax: 888-634-4472 • nationwide.com

Important Information: Complete this form when purchasing a new annuity contract with Nationwide. The information collected on this form is used to determine if recommendations appropriately match your financial needs. **Please include this form with your Nationwide Annuity Application, as well as the most recent statement for all associated accounts from a security and/or insurance product for exchange or replacement. If the new contract is an immediate annuity, please provide a current income comparison quote/illustration from the existing contract carrier.**

Name: [REDACTED] Date of Birth: 06/06/1965
SSN: [REDACTED] Phone: [REDACTED]
Email: [REDACTED]

Joint Owner's Name (if applicable): _____
Date of Birth: _____ **SSN:** _____ **Phone:** _____
Email: _____

Marital Status: ☐ Single ☒ Married ☐ Divorced/Separated ☐ Widowed

Employment Status: ☒ Employed ☐ Self Employed ☐ Homemaker ☐ Student ☐ Retired
☐ Disabled ☐ Unemployed ☐ Other:

If employed or self employed, please provide the following information:

Name of Employer: [REDACTED] Occupation/Job Title: [REDACTED]

Financial Information - Person (If using a non-natural owner, please provide annuitant information in space below.)

Annual Household Income (include all household income, i.e., spouse) \$: <u>100,000.00</u> <input checked="" type="checkbox"/> Gross OR <input type="checkbox"/> Net	Income Tax Bracket: <input type="checkbox"/> 0% <input type="checkbox"/> 25% <input type="checkbox"/> 5% <input type="checkbox"/> 35% <input type="checkbox"/> 10% <input type="checkbox"/> >35% <input checked="" type="checkbox"/> 15%	Annual Expenses: \$: <u>50,000.00</u>	Approximate Total Net Worth: \$: <u>102,500.00</u> (The total assets listed in this field should equal all assets listed in the assets table below. Do not include client's residence.)	Liquid Assets after Annuity Purchase: \$: <u>2,500.00</u> (Checking, savings, money market funds, and securities that can be sold without penalties)
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Assets

Liquid Assets		Non-Liquid Assets	
Asset Type	Current Value	Asset Type	Current Value
Checking and Savings Accounts	2,500.00	Life Insurance	
Mutual Funds (A & C shares)		Mutual Funds (B shares)	
Employer Based Retirement Plans (if older than 59½)		Employer Based Retirement Plans (if younger than 59½)	100,000.00
CD		Fixed Annuity in Surrender Period	
Fixed Annuity (penalty-free)		Variable Annuity in Surrender Period	
Variable Annuity (penalty-free)		Other:	
Stocks and Bonds		Other:	
Other:			
Total:	2,500.00	Total:	100,000.00

☐ See attached statement(s)