SAFE MONEY STRATEGIES

Date:

SPIA FORM

Allianz-American Equity-American Investors-American National Equitrust-Great American-ING-Liberty Bankers-Lincoln Financial Loyal American-Mutual of Omaha-National Western Old Mutual-Presidential Life-Sun Life
AGENT NAME: STATE:
CLIENT NAME: Male/Female
JOINT CLIENT NAME: Male/Female
CLIENT - AGE/DOB JOINT CLIENT - AGE/DOB
Carrier Rating make a difference: Yes or No
LIFE ONLY: LIFE/PC: PC: JT LIFE: JT LIFE/PC:
PREMIUM/PAYMENT AMOUNT:
COST BASIS:
Monthly Quarterly Semi-Annual Annual-1year Annual-Upfront
NON-QUALIFIED/QUALIFIED
NOTES:
Appointment date and time:

Fax: 813-289-2804