

What you should know about the annuities I can sell and how I'm paid

I am licensed to sell annuities in Texas. But before I can recommend an annuity to you, I must tell you which types of annuities and other financial products I'm allowed to sell. I must also tell you which companies I represent and how I'm paid for the annuities I sell. Do not sign this form unless you have read and understand it.

Your name: _____
First Last

Information about me

First name: _____ Last name: _____

Business/agency name: _____ Website: _____

Business mailing address: _____

Business telephone number: _____

Email address: _____

National producer number in Texas: _____

What products can I sell you?

If I recommend that you buy an annuity, it means I believe it effectively meets your financial situation, insurance needs, and financial objectives. Other financial products – such as life insurance or stocks, bonds, and mutual funds – also may meet your needs.

I am licensed to sell the following products in Texas:

- Fixed or fixed indexed annuities
- Variable annuities
- Life insurance

I need a separate license to give you advice about non-insurance financial products and to sell them. I am licensed and authorized to give advice about or sell the following non-insurance products:

- Mutual funds
- Stocks/bonds
- Certificates of deposits

Whose annuities can I sell to you?

I am authorized to sell:

- Annuities from only one insurer
- Annuities from two or more insurers
- Annuities from two or more insurers, although I primarily sell annuities from:

How am I paid for my work?

Depending on the annuity you buy, I will be paid in one of the following ways:

- A commission, which is usually paid by the insurance company or by other sources. If I'm paid by other sources, they are:

- A fee, which is usually paid by you. The fee may be a fixed amount, an hourly rate, or a percentage of your payment.
- Other: _____
- I may also receive non-cash compensation from the insurance company or another source. This may include health or retirement benefits, office rent and support, or other incentives.

If you have questions about how I'll be paid for the sale of this annuity, please ask me.

Signatures

By signing below, you acknowledge that you have read and understand the information in this document.

Your signature (person buying the annuity)

My signature (agent or producer)

Date

Date