

Sign this form if you refuse to give me information I need to advise you about buying an annuity

Do not sign this form unless you have read and understood it.

Why did I give you this form?

To recommend an annuity that effectively meets your needs, objectives, and situation, I need information about you, your financial situation, insurance needs, and financial objectives. **If you do not provide the information, or provide inaccurate information, you could lose legal protections under the Texas Insurance Code.**

Signing this form means you acknowledge that you did not provide some or all of the information I need to decide if the annuity effectively meets your needs and situation.

Check the appropriate box below then sign and date the form:

- I refuse to provide this information at this time.
- I choose to provide only limited information at this time.

Your signature

Date