

Annuity Quote Request

Please complete and return to Chez Santa Maria at chez@msinsentra.com

If you have questions, contact us: 480-563-2020 or info@msinsentra.com



MS INSENTRA LLC

Agent Information:

Name:

Phone:

Email:

Quote Need by Date:

Client Information:

Name:

Sex:

Date of Birth:

State of Policy Issue:

Asset(s) Available for Illustration:

Tax Status: (for each asset if more than one listed) Qualified, Non-Qualified

Special Considerations for Assets: (i.e., surrender charges, taxes, etc.)

Concept (goal): Accumulation Death Benefit Guaranteed Lifetime Income

For Income, Desired Deferral:

Spouse's Age:

Annuity Type: Traditional Fixed FIA SPIA:

MYGA:

Additional Notes: