

Income Annuity Survey Details	
Owner's State of Residence	California
State of Issue	California
Owner	Mr. Valued Client
Name	Mr. Valued Client
Birth Date	June 8, 1947
Sex	Male
Annuity Type	Single Life
Fund Type	Non-qualified
Guarantee Type	Certain period
Premium	\$1,000,000.00
Cost Basis	\$1,000,000.00
Purchase Date	April 13, 2014
Payment Frequency	Monthly
Income Start Date	May 13, 2014
Certain Period	10 Years
Return of Premium before Income Start Date	No
Rating Company:	A.M. Best
Rating Level:	All

Financial Institution	Monthly Income	Monthly Taxable Portion	Guaranteed To End Of	Notes	Rating
Symetra Life Insurance Company	\$5,709.97	\$1,416.07	APR-23-2014	See below	A
American General Life Insurance Company	\$5,654.04	\$1,368.28	APR-20-2014	See below	A
American National Insurance Company	\$5,653.55	\$1,368.16	APR-20-2014	See below	A
Minnesota Life Insurance Company - A Securian Co.	\$5,615.92	\$1,330.97	APR-23-2014		A+
Athene Annuity & Life Assurance Company	\$5,591.31	\$1,453.74	APR-20-2014	See below	B++
New York Life Insurance & Annuity Corporation	\$5,565.09	\$1,279.97	APR-27-2014	See below	A++
Principal Financial Group	\$5,554.67	\$1,266.46	APR-22-2014	See below	A+
Integrity Life Insurance Company (W&S)	\$5,541.89	\$1,252.47	APR-20-2014	See below	A+
ING USA Annuity and Life Insurance Company	\$5,513.92	\$1,224.09	APR-20-2014	See below	A
The Lincoln National Life Insurance Company	\$5,454.44	\$1,161.80	APR-20-2014		A+
Protective Life Insurance Company	\$4,889.21	\$573.02	APR-14-2014		A+
Genworth Life Insurance Company	\$4,839.64	\$522.68	APR-20-2014	See below	A
Genworth Life and Annuity Insurance Company	\$4,839.64	\$522.68	APR-20-2014	See below	A

Financial Institution	Notes
American General Life Insurance Company	Additional features are available, such as: withdrawal benefits; a variety of payment increase options; ability to customize ownership and payee structure; and institutional pricing for qualifying groups. For more information, please contact Product Support at 1-855-793-1577.
American National Insurance Company	Product offers liquidity options and other features, subject to availability.
Athene Annuity & Life Assurance Company	Premium returned if the primary annuitant dies before payments begin.
Genworth Life Insurance Company	Product offers liquidity options, subject to availability. For more information, please contact the Sales Desk at 1-877-239-6374.
	A Proof of Birth list is generated for all illustrations containing life contingent benefits.
Genworth Life and Annuity Insurance Company	Product offers liquidity options, subject to availability. For more information,

	please contact the Sales Desk at 1-877-239-6374.
	A Proof of Birth list is generated for all illustrations containing life contingent benefits.
ING USA Annuity and Life Insurance Company	For more information, please contact the ING Fixed Annuities Sales Desk at 1-800-369-5301, option 2.
Integrity Life Insurance Company (W&S)	IncomeSource® offers liquidity that does not have to be elected at issue, an optional increasing payout from 1% to 5% and a wide range of payouts, including Cash refund and Temporary Life. Subject to limitations and availability.
New York Life Insurance & Annuity Corporation	Product offers liquidity options and other features, subject to availability. For more information, please contact the Sales Desk at 1-888-474-7725, option 2.
Principal Financial Group	Includes a withdrawal benefit. See quote for details.
	This product offers an optional Fixed Percentage Periodic Increase Rider, which will increase the annuity income payment periodically throughout the life of the annuity. A client can select a 2% increase every 2 years, 3% increase every 3 years, 4% increase every 4 years, or 5% increase every 5 years. For an illustration with this feature please contact our Pre-Sale Support Team at 866-309-1623. The feature can only be elected at the time of contract issue.
Symetra Life Insurance Company	Inflation Options: Fractional COLA percentage options that can range from 0.10% to 6.50%.
	Access: 1. Advance Access, subject to state availability, comes standard with all payout options (e.g., life, joint life, period certain). Permits client access to up to 30% of the value of future payments (minimum of \$5,000), available 36 months after purchase, and can be accessed as frequently as every 36 months during life expectancy, or the length of the certain period, as applicable.
	Access: 2. Optional commutation to beneficiary, subject to state availability, gives beneficiary option to convert any remaining guaranteed payments into a single lump sum payment based on present value.
	For information or illustrations, contact our Sales Desk at 1-800-706-0700.

### Survey Notes

Income received in excess of the investment in the contract is taxable as ordinary income.

**The content of this page may not be adequate to fulfill the policy application process for some carriers, which require an illustration. This can be obtained by clicking on the carrier name.**

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