

ANNUITY NECESSARY DOCUMENTATION

The following is a list of the documentation or items that will be required for the successful completion and release of payment for Annuity transactions.

Annuity Information Checklist

- ___ Client's name
- ___ Client's address
- ___ Client's telephone
- ___ Settlement Agreement
- ___ Annuity Contract or Letter of Benefits

** Please note that there may be additional requests if necessary to properly process and complete the transaction