



US Financial Marketing Group, a national insurance agency, USFMG LLC

TheUSBroker.com SPIA Quote Request Form – please fax to 315.655.4784

Broker Name: Phone:
E-mail: Fax:

Annuitant Name :
DOB:

If Joint and Survivor:
Spouse Name:
DOB:

State:

Principal Amount:
Or
Income to be Provided:

Income Mode:
 Monthly Quarterly Semi-annual Annual

 Qualified Nonqualified

SPIA Type:
 Joint and 100% Survivor
 Joint and 50% Survivor
 Life Only
 Life with Years Certain and Continuous
 Period Certain. Specify # of Years:
 Other. Please Specify:

Will SPIA be used to fund LTC or Life Insurance?

Is either annuitant impaired?
 No
 Yes (Please provide summary. Underwriting review will be required for final quote.)

Other Info:]