

SUITABILITY IN ANNUITY TRANSACTIONS

Thank you for your interest in a Symetra Life Insurance Company annuity. Before we can process your application and issue your contract, we need to confirm that your annuity purchase suits your current financial objective and long-term goals. **Please complete this form in its entirety and submit with your application.**

Owner's name:	Occupation:	Owner's SSN:	Date of Birth:
Joint Owner's name:	Occupation:	Joint Owner's SSN:	Date of Birth:

Your privacy is a high priority to us. The information you provide will be treated with the highest degree of confidentiality.

Financial information:

- Approximate annual **household income** \$ _____ **Net worth** \$ _____
- Marital Status** Single Married Divorced Widowed **Number of Dependents** _____
- Federal Tax Rate:** 0% 10% 15% 25% 28% 33% 35%
- What is your **source** for this annuity's purchase payment? **(check all that apply)**
 Annuity Life insurance CD Inheritance Savings/checking Current income
 Reverse mortgage/home equity loan Other _____

Financial objectives:

- What are your **financial objective(s)** in purchasing this product? **(check all that apply)**
 Income now Future income Tax-deferred growth Growth Pass on to heirs
 Other _____
- After purchasing this annuity, will you have sufficient funds available without penalty for emergencies?
 Yes No
- If you are replacing an existing annuity or life contract, is there a **surrender charge**? Yes No
If there is a charge, what is the amount? \$ _____
- Is there a **surrender charge** on the product you are purchasing today? Yes No
If there is a charge, for how many years? _____
- When** do you anticipate taking your **first distribution** from this annuity? **(choose one)**
 Less than one year Between 1-5 years Between 6-9 years 10 or more years
 None anticipated

Reason for purchase:

- I believe this product meets my needs at this time Yes No
- I have chosen to purchase an annuity other than the recommended product. Yes No

To the best of my knowledge, the information above is accurate and complete.

Owner Signature

Date

Joint Owner Signature

Date

Agent Signature

Date