

SECONDARY MARKET ANNUITIES March 20, 2024 (sorted by Start Date)					
Company	Start Date	Cost	Payout	Rate	Status
Prudential	2024-02-01	\$178,387	\$439,000	6.10 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-02-01	\$1,000.00	30 monthly payments	2026-07-01	None
	2027-10-25	\$10,000.00	1 lump sum	2027-10-25	None
	2032-10-25	\$20,000.00	1 lump sum	2032-10-25	None
	2037-10-25	\$50,000.00	1 lump sum	2037-10-25	None
	2042-10-25	\$330,000.00	1 lump sum	2042-10-25	None
AIG	2024-04-01	\$207,721	\$501,132	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-01	\$850.00	3 monthly payments	2024-06-01	None
	2024-07-01	\$873.00	360 monthly payments	2054-06-01	3.00%
Prudential Life	2024-04-01	\$87,878	\$156,569	5.81 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-01	\$500.00	2 monthly payments	2024-05-01	None
	2024-06-01	\$502.00	252 monthly payments	2045-05-01	2.00%
USAA Life	2024-04-01	\$534,795	\$879,848	5.73 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-01	\$3,712.00	237 monthly payments	2043-12-01	None
Independent Life	2024-04-01	\$167,927	\$243,390	5.41 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-01	\$1,337.00	182 monthly payments	2039-05-01	None
Berkshire Hathaway	2024-04-06	\$148,048	\$277,219	5.75 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-06	\$500.00	30 monthly payments	2026-09-06	None
	2026-10-06	\$870.00	228 monthly payments	2045-09-06	3.00%
Brighthouse Life	2024-04-07	\$219,977	\$315,525	5.00 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-07	\$1,668.00	189 monthly payments	2039-12-07	None
Talcott Resolution	2024-04-10	\$77,554	\$146,000	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-10	\$500.00	167 monthly payments	2038-02-10	None
	2038-10-10	\$500.00	125 monthly payments	2049-02-10	None
Lincoln Financial	2024-04-10	\$68,927	\$108,000	5.61 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-10	\$500.00	216 monthly payments	2042-03-10	None

SECONDARY MARKET ANNUITIES March 20, 2024 (sorted by Start Date)					
Company	Start Date	Cost	Payout	Rate	Status
Berkshire Hathaway	2024-04-10	\$486,711	\$711,450	5.43 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-10	\$3,825.00	186 monthly payments	2039-09-10	None
MetLife	2024-04-15	\$720,713	\$1,185,000	5.72 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-15	\$5,000.00	9 monthly payments	2024-12-15	None
	2025-01-15	\$5,000.00	228 monthly payments	2043-12-15	None
MetLife	2024-04-15	\$360,549	\$592,500	5.71 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-15	\$2,500.00	9 monthly payments	2024-12-15	None
	2025-01-15	\$2,500.00	228 monthly payments	2043-12-15	None
Pacific Life	2024-04-15	\$86,549	\$123,490	5.35 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-15	\$400.00	121 monthly payments	2034-04-15	None
	2029-05-14	\$25,000.00	1 lump sum payment	2029-05-14	None
	2034-05-14	\$50,000.00	1 lump sum payment	2034-05-14	None
MetLife	2024-04-16	\$71,800	\$120,398	5.75 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-16	\$450.00	9 monthly payments	2024-12-16	None
	2025-01-16	\$493.00	236 monthly payments	2044-08-16	None
Prudential Life	2024-04-18	\$160,282	\$229,746	5.33 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-18	\$650.00	21 monthly payments	2025-12-18	None
	2025-01-18	\$10,000.00	1 lump sum payment	2025-01-18	None
	2026-01-18	\$1,092.00	144 monthly payments	2037-12-18	3.00%
	2030-01-18	\$10,000.00	1 lump sum payment	2030-01-18	None
	2035-01-18	\$10,000.00	1 lump sum payment	2035-01-18	None
John Hancock	2024-04-20	\$274,823	\$579,164	5.99 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-20	\$1,300.00	8 monthly payments	2024-11-20	None
	2024-12-20	\$1,300.00	300 monthly payments	2049-11-20	3.00%
AIG	2024-04-26	\$63,622	\$93,000	5.43 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-26	\$500.00	186 monthly payments	2039-09-26	None

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Company	Start Date	Cost	Payout	Rate	Status
Talcott Resolution	2024-04-28	\$281,280	\$661,310	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-04-28	\$1,100.00	93 monthly payments	2031-12-28	None
	2032-01-28	\$2,070.00	270 monthly payments	2054-06-28	None
Berkshire Hathaway	2024-06-03	\$334,847	\$517,000	5.38 %	inreview (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-03	\$1,000.00	153 monthly payments	2037-02-03	None
	2027-03-03	\$64,000.00	1 lump sum payment	2027-03-03	None
	2032-03-03	\$100,000.00	1 lump sum payment	2032-03-03	None
	2037-03-03	\$200,000.00	1 lump sum payment	2037-03-03	None
Symetra	2024-07-01	\$136,860	\$562,500	6.10 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-07-01	\$500.00	45 monthly payments	2028-03-01	None
	2033-04-01	\$500.00	120 monthly payments	2043-03-01	None
	2043-04-01	\$2,000.00	240 monthly payments	2063-03-01	None
Pacific Life	2024-08-26	\$87,486	\$116,277	5.30 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-08-26	\$250.00	60 monthly payments	2029-07-26	None
	2026-08-26	\$25,000.00	1 lump sum payment	2026-08-26	None
	2031-08-26	\$76,277.00	1 lump sum payment	2031-08-26	None
Berkshire Hathaway	2024-09-17	\$338,675	\$677,360	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-09-17	\$1,701.00	360 monthly payments	2054-08-17	None
	2024-09-17	\$15,000.00	1 lump sum payment	2024-09-17	None
	2027-09-17	\$50,000.00	1 lump sum payment	2027-09-17	None
Prudential Life	2024-11-24	\$56,606	\$67,505	5.50 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-11-24	\$20,000.00	1 lump sum payment	2024-11-24	None
	2028-11-24	\$47,505.00	1 lump sum payment	2028-11-24	None
NY Life	2024-11-24	\$27,957	\$35,000	5.00 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-11-24	\$15,000.00	1 lump sum	2024-11-24	None
	2029-11-24	\$10,000.00	1 lump sum	2029-11-24	None
	2032-11-24	\$10,000.00	1 lump sum	2032-11-24	None

SECONDARY MARKET ANNUITIES March 20, 2024 (sorted by Start Date)					
Company	Start Date	Cost	Payout	Rate	Status
New York Life	2025-01-01	\$326,847	\$522,874	5.51 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-01-01	\$960.00	36 monthly payments	2027-12-01	None	
2028-01-01	\$2,163.00	156 monthly payments	2040-12-01	None	
2028-04-26	\$51,520.00	1 lump sum payment	2028-04-26	None	
2033-04-26	\$51,520.00	1 lump sum payment	2033-04-26	None	
2038-04-26	\$47,840.00	1 lump sum payment	2038-04-26	None	
John Hancock	2025-01-15	\$69,647	\$155,446	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-01-15	\$300.00	116 monthly payments	2034-08-15	None	
2034-09-15	\$670.00	180 monthly payments	2049-08-15	None	
MetLife	2025-07-30	\$28,978	\$40,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-07-30	\$20,000.00	1 lump sum payment	2025-07-30	None	
2035-07-30	\$20,000.00	1 lump sum payment	2035-07-30	None	
Prudential Life	2025-08-03	\$150,917	\$261,920	5.77 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-08-03	\$13,096.00	20 annual payments	2044-08-03	None	
Pacific Life	2026-08-01	\$35,295	\$53,650	6.00 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-08-01	\$8,000.00	1 lump sum payment	2026-08-01	None	
2028-08-01	\$9,000.00	1 lump sum payment	2028-08-01	None	
2030-08-01	\$9,000.00	1 lump sum payment	2030-08-01	None	
2032-08-01	\$10,500.00	1 lump sum payment	2032-08-01	None	
2034-08-01	\$10,500.00	1 lump sum payment	2034-08-01	None	
2039-08-01	\$6,650.00	1 lump sum payment	2039-08-01	None	
Transamerica	2027-04-15	\$50,589	\$58,475	4.75 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2027-04-15	\$58,475.00	1 lump sum	2027-04-15	None	
Pacific Life	2027-07-07	\$111,901	\$195,000	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2027-07-07	\$7,500.00	10 annual payments	2036-07-07	None	
2036-07-07	\$120,000.00	1 lump sum	2036-07-07	None	

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Talcott Resolution	2027-09-28	\$37,933	\$68,000	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2027-09-28	\$17,000.00	1 lump sum payment	2027-09-28	None
	2032-09-28	\$17,000.00	1 lump sum payment	2032-09-28	None
	2037-09-28	\$17,000.00	1 lump sum payment	2037-09-28	None
	2042-09-28	\$17,000.00	1 lump sum payment	2042-09-28	None
AIG	2028-01-01	\$97,357	\$194,800	5.89 %	inreview (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2028-01-01	\$800.00	231 monthly payments	2047-03-01	None
	2032-04-01	\$10,000.00	1 lump sum payment	2032-04-01	None
MetLife	2028-07-30	\$81,077	\$100,000	5.00 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2028-07-30	\$100,000.00	1 lump sum	2028-07-30	None
United of Omaha	2028-09-29	\$54,064	\$118,187	6.00 %	inreview (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2028-09-29	\$18,625.00	1 lump sum payment	2028-09-29	None
	2034-09-29	\$25,024.00	1 lump sum payment	2034-09-29	None
	2039-09-29	\$32,361.00	1 lump sum payment	2039-09-29	None
	2044-09-29	\$42,175.00	1 lump sum payment	2044-09-29	None
Prudential Life	2028-11-24	\$60,022	\$75,000	5.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2028-11-24	\$75,000.00	1 lump sum payment	2028-11-24	None
American General	2029-03-01	\$95,162	\$156,574	5.60 %	Pre-order (c)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2029-03-01	\$1,824.00	48 monthly payments	2033-02-01	3% Annual Increase Each March
	2036-11-03	\$65,000.00	1 lump sum	2036-11-03	None
Genworth	2029-04-12	\$62,888	\$83,132	5.80 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2029-04-12	\$83,132.00	1 lump sum payment	2029-04-12	None
Lincoln Financial	2029-11-19	\$41,573	\$70,000	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2029-11-19	\$20,000.00	1 lump sum payment	2029-11-19	None
	2034-10-19	\$25,000.00	1 lump sum payment	2034-10-19	None
	2034-11-19	\$25,000.00	1 lump sum payment	2034-11-19	None

SECONDARY MARKET ANNUITIES March 20, 2024 (sorted by Start Date)					
Company	Start Date	Cost	Payout	Rate	Status
Brighthouse Financial	2031-01-18	\$52,542	\$73,500	5.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2031-01-18	\$73,500.00	1 lump sum payment	2031-01-18	None	
Prudential Life	2031-01-24	\$178,473	\$262,000	5.87 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2031-01-24	\$262,000.00	1 lump sum payment	2031-01-24	None	
Pacific Life	2031-09-03	\$88,937	\$135,400	5.89 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2031-09-03	\$135,400.00	1 lump sum payment	2031-09-03	None	
Symetra Life	2034-06-07	\$75,822	\$135,600	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-06-07	\$135,600.00	1 lump sum payment	2034-06-07	None	
Symetra Life	2034-06-07	\$87,922	\$148,500	5.33 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-06-07	\$148,500.00	1 lump sum payment	2034-06-07	None	
Prudential Life	2034-08-08	\$45,801	\$83,333	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-08-08	\$83,333.00	1 lump sum payment	2034-08-08	None	
Prudential Life	2036-01-24	\$70,668	\$140,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2036-01-24	\$140,000.00	1 lump sum payment	2036-01-24	None	
Prudential Life	2036-01-24	\$106,003	\$210,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2036-01-24	\$210,000.00	1 lump sum payment	2036-01-24	None	
MetLife	2036-12-30	\$57,910	\$114,745	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2036-12-30	\$114,745.00	1 lump sum	2036-12-30	None	
AIG	2037-02-15	\$93,495	\$200,000	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-02-15	\$200,000.00	1 lump sum payment	2037-02-15	None	
Brighthouse Financial	2037-09-14	\$108,388	\$240,000	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$240,000.00	1 lump sum payment	2037-09-14	None	

Secondary Market Annuities (SMAs) are policies being transferred by an annuitant pursuant to state transfer laws. Annuities listed are subject to prior purchase, prior sale, or withdrawal by seller. Interest, payments, and prices are calculated using industry standards. All information in this list is subject to change and is not guaranteed. In case of a discrepancy, information in the final closing documents will govern.

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Company	Start Date	Cost	Payout	Rate	Status
Brighthouse Financial	2037-09-14	\$76,639	\$169,700	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$169,700.00	1 lump sum payment	2037-09-14	None	
Brighthouse Financial	2037-09-14	\$72,259	\$160,000	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$160,000.00	1 lump sum payment	2037-09-14	None	
Prudential Life	2039-08-08	\$67,229	\$166,666	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2039-08-08	\$166,666.00	1 lump sum payment	2039-08-08	None	
USAA Life	2039-10-03	\$34,976	\$87,500	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2039-10-03	\$87,500.00	1 lump sum payment	2039-10-03	None	
Prudential Life	2042-12-09	\$39,439	\$239,223	6.30 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2042-12-09	\$797.00	300 monthly payments	2067-11-09	None	
American General	2043-07-13	\$30,106	\$102,621	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2043-07-13	\$1,077.00	4 monthly payments	2043-10-13	None	
2043-11-13	\$1,098.00	84 monthly payments	2050-10-13	2% Annual Increase Each November	
MetLife	2044-01-15	\$47,605	\$150,100	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2044-01-15	\$150,100.00	1 lump sum payment	2044-01-15	None	