

Jumbo Annuity Approval Request

Broker: _____ Phone: _____ Date: _____

Purchaser: _____ Transfer Date: _____ Proposed premium \$ _____

If premium will be split between several companies, what is the smallest amount per company? \$ _____

ANNUITANT / OWNER / PAYEE (Complete the following sections as they apply):

Check one: **Annuitant** **Owner** (if other than Annuitant) **Payee** receives payments (if other than Annuity/Owner)

Name _____ Gender M F N/A

Date of Birth/Incorp _____ SSN/TIN _____

Full Address _____

Check one: **Annuitant** **Owner** (if other than Annuitant) **Payee** receives payments (if other than Annuity/Owner)

Name _____ Gender M F N/A

Date of Birth/Incorp _____ SSN/TIN _____

Full Address _____

Check one: **Annuitant** **Owner** (if other than Annuitant) **Payee** receives payments (if other than Annuity/Owner)

Name _____ Gender M F N/A

Date of Birth/Incorp _____ SSN/TIN _____

Full Address _____

Annuitant's net worth: \$ _____ Owner's net worth: \$ _____

How was the premium money accumulated? _____

At which bank or brokerage is the premium money currently on deposit? _____

Name and phone no. of reference at current bank or brokerage: _____

Form completed by: _____ **Date:** _____

IMPORTANT: The insurance company may require additional information in order to approve the purchase.

Fax to (866) 866-2232 or email to: hs@webannuities.net

WebAnnuities Insurance Agency, Inc.
28 Harrison Ave, D908, Englishtown, NJ 07726

Online at: www.immediateannuities.com
Tollfree: (866) 866-1999