

Comparative Annuity Reports

Your guide to comparing data about Single Premium Immediate Annuity programs

March 2015

1-800-872-6684

www.immediateannuities.com/comparativeannuityreports/

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SUMMARY OF IMMEDIATE ANNUITY PAYOUTS

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Period (Term) <u>Certain Only</u>	<u>Average</u>	<u>Highest</u>	Single Life <u>Only</u>	<u>Average</u>	<u>Highest</u>	Single Life with <u>10-Years Certain</u>	<u>Average</u>	<u>Highest</u>
5-Year Pd. Cert.	\$ 1,682	\$ 1,715	Male Age 60	\$ 474	\$ 497	Male Age 60	\$ 467	\$ 487
10-Year Pd. Cert.	\$ 892	\$ 910	Fem. Age 60	\$ 448	\$ 466	Fem. Age 60	\$ 443	\$ 462
15-Year Pd. Cert.	\$ 643	\$ 665	Male Age 65	\$ 533	\$ 563	Male Age 65	\$ 519	\$ 542
20-Year Pd. Cert.	\$ 524	\$ 552	Fem. Age 65	\$ 499	\$ 516	Fem. Age 65	\$ 490	\$ 505
25-Year Pd. Cert.	\$ 455	\$ 481	Male Age 70	\$ 615	\$ 652	Male Age 70	\$ 584	\$ 602
30-Year Pd. Cert.	\$ 408	\$ 437	Fem. Age 70	\$ 568	\$ 588	Fem. Age 70	\$ 550	\$ 565
			Male Age 75	\$ 732	\$ 777	Male Age 75	\$ 663	\$ 681
			Fem. Age 75	\$ 672	\$ 700	Fem. Age 75	\$ 628	\$ 645

Above figures are monthly income per \$100,000 non-qualified premium in a non-premium tax state.

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Comparative Annuity Report Data on SPIA annuities are quoted monthly in Kiplinger's Retirement Report.

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Gender & Age	2014												2015		
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	MoM	YoY
M60*	\$495	\$494	\$491	\$485	\$485	\$483	\$480	\$484	\$478	\$479	\$475	\$465	\$467	0.43%	-5.82%
F60*	\$470	\$469	\$466	\$461	\$462	\$459	\$455	\$460	\$454	\$455	\$451	\$441	\$443	0.45%	-5.91%
M65*	\$547	\$546	\$543	\$536	\$537	\$535	\$532	\$536	\$530	\$533	\$527	\$518	\$519	0.19%	-5.25%
F65*	\$517	\$516	\$513	\$508	\$508	\$506	\$503	\$507	\$501	\$503	\$498	\$489	\$490	0.20%	-5.36%
M70*	\$610	\$609	\$607	\$600	\$601	\$599	\$596	\$600	\$595	\$596	\$591	\$583	\$584	0.17%	-4.36%
F70*	\$575	\$574	\$572	\$566	\$566	\$564	\$561	\$565	\$560	\$562	\$557	\$549	\$550	0.18%	-4.44%
M75*	\$685	\$685	\$683	\$677	\$679	\$672	\$674	\$678	\$672	\$673	\$670	\$662	\$663	0.15%	-3.26%
F75*	\$651	\$651	\$649	\$642	\$644	\$642	\$639	\$643	\$637	\$639	\$635	\$628	\$628	0.00%	-3.60%
10PC**	\$902	\$901	\$900	\$895	\$896	\$895	\$894	\$897	\$894	\$895	\$895	\$891	\$892	0.11%	-1.11%
25PC**	\$480	\$479	\$475	\$470	\$471	\$469	\$465	\$469	\$462	\$465	\$461	\$453	\$455	0.44%	-5.35%
AVG	\$593	\$592	\$590	\$584	\$585	\$582	\$580	\$584	\$578	\$580	\$576	\$568	\$569	0.23%	-4.45%

Legend: MoM = month over month change, YoY = year over year change

* Monthly income per \$100,000 for life with 10 years certain immediate annuity. M60=male age 60, F60=female age 60, etc.

**Monthly income per \$100,000 for X year period certain only annuity, 10PC=10 years, 25PC=25 years

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Trends in Monthly Income Since 2003 Life & 10 Years Certain Annuity (10C&C) for M/F Ages 65 and Yield on Moody's AAA Corp. Bonds March, 2015

