

Comparative Annuity Reports

Your guide to comparing data about Single Premium Immediate Annuity programs

May 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.	\$ 1,679	\$ 1,696	Male Age 60	\$ 471	\$ 494	Male Age 60	\$ 464	\$ 484
10-Year Pd. Cert.	\$ 892	\$ 912	Fem. Age 60	\$ 445	\$ 466	Fem. Age 60	\$ 441	\$ 462
15-Year Pd. Cert.	\$ 641	\$ 665	Male Age 65	\$ 531	\$ 558	Male Age 65	\$ 517	\$ 536
20-Year Pd. Cert.	\$ 521	\$ 552	Fem. Age 65	\$ 497	\$ 515	Fem. Age 65	\$ 489	\$ 506
25-Year Pd. Cert.	\$ 452	\$ 474	Male Age 70	\$ 611	\$ 649	Male Age 70	\$ 582	\$ 600
30-Year Pd. Cert.	\$ 404	\$ 429	Fem. Age 70	\$ 566	\$ 587	Fem. Age 70	\$ 548	\$ 567
			Male Age 75	\$ 729	\$ 775	Male Age 75	\$ 662	\$ 676
			Fem. Age 75	\$ 669	\$ 698	Fem. Age 75	\$ 627	\$ 643

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.

Comparative Annuity Reports - May 2015

Gender & Age	2014												2015		
	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	MoM	YoY
M60*	\$491	\$485	\$485	\$483	\$480	\$484	\$478	\$479	\$475	\$465	\$467	\$464	\$464	0.00%	-5.65%
F60*	\$466	\$461	\$462	\$459	\$455	\$460	\$454	\$455	\$451	\$441	\$443	\$441	\$441	0.00%	-5.51%
M65*	\$543	\$536	\$537	\$535	\$532	\$536	\$530	\$533	\$527	\$518	\$519	\$517	\$517	0.00%	-4.91%
F65*	\$513	\$508	\$508	\$506	\$503	\$507	\$501	\$503	\$498	\$489	\$490	\$489	\$489	0.00%	-4.79%
M70*	\$607	\$600	\$601	\$599	\$596	\$600	\$595	\$596	\$591	\$583	\$584	\$582	\$582	0.00%	-4.21%
F70*	\$572	\$566	\$566	\$564	\$561	\$565	\$560	\$562	\$557	\$549	\$550	\$548	\$548	0.00%	-4.29%
M75*	\$683	\$677	\$679	\$672	\$674	\$678	\$672	\$673	\$670	\$662	\$663	\$662	\$662	0.00%	-3.12%
F75*	\$649	\$642	\$644	\$642	\$639	\$643	\$637	\$639	\$635	\$628	\$628	\$627	\$627	0.00%	-3.45%
10PC**	\$900	\$895	\$896	\$895	\$894	\$897	\$894	\$895	\$895	\$891	\$892	\$891	\$892	0.11%	-0.89%
25PC**	\$475	\$470	\$471	\$469	\$465	\$469	\$462	\$465	\$461	\$453	\$455	\$453	\$452	-0.22%	-4.96%
AVG	\$590	\$584	\$585	\$582	\$580	\$584	\$578	\$580	\$576	\$568	\$569	\$567	\$567	-0.01%	-4.18%

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 May, 2015

