

Comparative Annuity Reports

Your guide to comparing data about Single Premium Immediate Annuity programs

September 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.	\$ 1,683	\$ 1,706	Male Age 60	\$ 483	\$ 499	Male Age 60	\$ 477	\$ 493
10-Year Pd. Cert.	\$ 902	\$ 922	Fem. Age 60	\$ 458	\$ 477	Fem. Age 60	\$ 454	\$ 470
15-Year Pd. Cert.	\$ 652	\$ 671	Male Age 65	\$ 543	\$ 563	Male Age 65	\$ 530	\$ 553
20-Year Pd. Cert.	\$ 532	\$ 552	Fem. Age 65	\$ 510	\$ 536	Fem. Age 65	\$ 501	\$ 526
25-Year Pd. Cert.	\$ 465	\$ 502	Male Age 70	\$ 623	\$ 638	Male Age 70	\$ 594	\$ 619
30-Year Pd. Cert.	\$ 417	\$ 449	Fem. Age 70	\$ 577	\$ 600	Fem. Age 70	\$ 560	\$ 586
			Male Age 75	\$ 740	\$ 766	Male Age 75	\$ 673	\$ 695
			Fem. Age 75	\$ 680	\$ 706	Fem. Age 75	\$ 638	\$ 664

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 - September 2015

Gender & Age	2014												2015		
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	MoM	YoY
M60*	\$480	\$484	\$478	\$479	\$475	\$465	\$467	\$464	\$464	\$471	\$478	\$479	\$477	-0.42%	-0.63%
F60*	\$455	\$460	\$454	\$455	\$451	\$441	\$443	\$441	\$441	\$448	\$455	\$457	\$454	-0.66%	-0.22%
M65*	\$532	\$536	\$530	\$533	\$527	\$518	\$519	\$517	\$517	\$524	\$531	\$532	\$530	-0.38%	-0.38%
F65*	\$503	\$507	\$501	\$503	\$498	\$489	\$490	\$489	\$489	\$496	\$503	\$503	\$501	-0.40%	-0.40%
M70*	\$596	\$600	\$595	\$596	\$591	\$583	\$584	\$582	\$582	\$588	\$595	\$596	\$594	-0.34%	-0.34%
F70*	\$561	\$565	\$560	\$562	\$557	\$549	\$550	\$548	\$548	\$555	\$562	\$562	\$560	-0.36%	-0.18%
M75*	\$674	\$678	\$672	\$673	\$670	\$662	\$663	\$662	\$662	\$667	\$674	\$674	\$673	-0.15%	-0.15%
F75*	\$639	\$643	\$637	\$639	\$635	\$628	\$628	\$627	\$627	\$632	\$639	\$639	\$638	-0.16%	-0.16%
10PC**	\$894	\$897	\$894	\$895	\$895	\$891	\$892	\$891	\$892	\$897	\$902	\$902	\$902	0.00%	0.89%
25PC**	\$465	\$469	\$462	\$465	\$461	\$453	\$455	\$453	\$452	\$458	\$465	\$466	\$465	-0.21%	0.00%
AVG	\$580	\$584	\$578	\$580	\$576	\$568	\$569	\$567	\$567	\$574	\$580	\$581	\$579	-0.31%	-0.16%

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
September, 2015

