

Income for Life

I M A G E L I S T

0010 Welcome	0270 Investing <i>Bonus slide</i>
0020 Workshop Objectives	0280 Annuities and Investing
0030 Our Commitment	0290 Annuities Provide Other Benefits
0040 Evaluation Form	0300 Supplementary Retirement Plan
0050 About Your Workbook	0310 Accessing Funds in an Annuity
0060 Financial Challenges	0320 1035 Exchange
0070 Income for Life: Annuities for an Income You Can't Outlive	0330 Split Annuity <i>Bonus slide</i>
0080 Income You Can't Outlive — The Annuity <i>Bonus slide</i>	0340 Estate Conservation Issues
0090 What Is an Annuity?	0350 Income for Life: Case Studies
0100 Types of Annuities	0360 Case Study — The Millers
0110 Deferred Annuity	0370 Case Study — The Millers
0120 How Deferred Annuities Work	0380 Case Study — Carol Walker
0130 Tax-Deferred Compounding <i>Bonus slide</i>	0390 Case Study — Carol Walker
0140 Immediate Annuity	0400 Income for Life: Important Questions
0150 How Immediate Annuities Work <i>Bonus calculator</i>	0410 Four Important Questions
0160 How Annuities Earn Interest	0420 Is an Annuity Appropriate for You?
0170 Fixed Annuity	0430 Annuity Costs
0180 Variable Annuity	0440 Additional Considerations
0190 Variable Annuity Disclosure	0450 Should You Choose a Fixed or Variable Annuity? <i>Bonus workbook exercise</i>
0200 Equity-Indexed Annuity	0460 How Do You Allocate a Variable Annuity?
0210 Income for Life: Tax Considerations	0470 Allocating a Variable Annuity
0220 Annuities and Taxes	0480 The Investment Spectrum <i>Bonus workbook exercise</i>
0230 The \$1,000-Per-Month Difference <i>Bonus workbook exercise</i>	0490 How Do You Select an Insurance Company?
0240 Penalties and Surrender Charges	0500 Selecting an Insurance Company
0250 Income for Life: Trends and Strategies	0510 Annuities and Financial Challenges
0260 Payout Options <i>Bonus calculator</i>	0520 Annuities and Creative Solutions

Income for Life

I M A G E L I S T

- 0530** Where Do You Go from Here?
- 0540** Where Do You Go from Here?
- 0550** Evaluation Form
- 0560** What to Bring
- 0570** Thank You

Bonus features

For Slide 0080:

0580 Centenarians Grow in Number

For Slide 0130:

0590 Taxes Make a Difference

For Slide 0150:

0600 Calculating Income from an Immediate Fixed Annuity (*calculator*)

For Slide 0230:

0610 The Effects of Taxes and Inflation (*workbook exercise*)

For Slide 0260:

0620 Guaranteed Retirement Income (*calculator*)

For Slide 0270:

0630 Historical Investment Performance

For Slide 0330:

0640 Income Today, Income Tomorrow

For Slide 0450:

0650 Should You Choose a Fixed or Variable Annuity? (*workbook exercise*)

For Slide 0480:

0660 Assessing Your Risk Tolerance (*workbook exercise*)