



HERMANN SONS LIFE

Information Needed In Order To Make An Informed Annuity Purchase

What is the purpose of this form?

To recommend an annuity that effectively meets your needs, objectives, and situation, I need information about you, your financial situation, insurance needs, and financial objectives. **If you do not provide all of the information, or if you provided inaccurate information, you could lose legal protections under the Texas Insurance Code.**

Check the appropriate box below then sign and date the form:

I did not provide all information at this time.

I provided all information to make an informed Annuity purchase.

Client signature

Date