

CASE FACTS

Jack and Sara purchased an annuity several years ago and are receiving \$6,000 per month for the next 95 months. Their financial circumstances have changed and it now makes more sense for them to receive a cash lump rather than waiting nearly eight years to receive the remaining payments.

The **New England Brokerage Annuity Purchase Program** will arrange for a lump sum payment of \$360,000 to help Jack and Sara better manage their current change in financial circumstances. In addition, you may earn a commission up to 4%.

Client Receives: \$360,000
Your Commission: \$14,400

WHY DO PEOPLE SELL ANNUITIES?

While a change in Jack & Sara's financial circumstances prompted the need to cash out their annuity, there are many reasons why people sell annuities, including: estate planning, tax planning, flexibility and control, liquidity, unneeded inheritance and others.

HOW DOES IT WORK?

The Annuity Purchase Program is a quick and easy process.

- You call the Annuity Purchase Administrator to receive a quote
- Your client completes a short application
- Your client reviews and signs an annuity purchase contract
- Your client receives the purchase price
- You receive a commission

THE ANNUITY PURCHASE ADMINISTRATOR IS STANDING BY

Our team is standing by to quickly and professionally evaluate your client's annuity and tailor the purchase to meet their specific needs.

HOW DO I LEARN MORE ABOUT THE NEW ENGLAND BROKERAGE ANNUITY PURCHASE PROGRAM?

To learn more about how you can offer the Annuity Purchase Program to your clients, please call your Relationship Manager at New England Brokerage or call the Annuity Purchase Administrator at:

1.800.444.9780

Meeting Your Financial Needs in a Changing WorldSM

Please contact us at 1.800.444.9780
www.subrisk.com