



FIUL Worksheet

Name: _____

Spouse: _____

Email: _____

Telephone: _____

Children's Name & Ages: _____

DOB: _____ NS: _____ S: _____

DOB: _____ NS: _____ S: _____

Spouse Email: _____

Spouse Telephone: _____

Are you putting aside money for your children's college education or for long term savings and/or retirement?

YES ☐ NO ☐

Comments _____

Are you contributing to or do you have a retirement account at work?

YES ☐ NO ☐

Comments _____

Are you contributing to or do you have an IRA?

YES ☐ NO ☐

Comments _____

In the past several years, have you lost any of your savings or retirement funds in the Stock Market?

YES ☐ NO ☐

Comments _____

Does market fluctuation concern you?

YES ☐ NO ☐

Comments _____

Do you think taxes will be lower, stay the same or increase in the future?

YES ☐ NO ☐

Comments _____

Do you think that Social Security is a viable retirement option?

YES ☐ NO ☐

Comments _____

If I could show you how to protect 100% of your retirement and/or savings from stock market losses but potentially receive stock market type returns, lock in your gains annually with the potential of enjoying a tax-free retirement utilizing internal revenue codes 72(e) and 7702 while protecting your family, would this be of interest to you?