

# Sammons Retirement Solutions® Hypothetical Illustration Request

## Instructions:

1. Provide all relevant information. Required fields are marked with an asterisk.
2. Select the LiveWell® Retirement Series product. (Please select only one product per request.)
3. Specify information for the product you selected.
4. Email completed form to your Internal Wholesaler or the Sammons Retirement Solutions® Sales Desk at [sdadmin@sfgmembers.com](mailto:sdadmin@sfgmembers.com).

Internal Wholesaler Name:

## Agent/Representative Information

*(Required fields are marked with an asterisk. All product option fields are required.)*

\*Agent/Representative Name:

Agent/Representative Title:

\*Agent/Representative Email:

Broker/Dealer Name:

Company/Business Name:

## Client Information

\*Client Name:

\*Client Age:

\*Gender:

\*State:

Spouse Name:

Spouse Age:

\*Investment Amount:

\*Tax Type:

## Notes

**Please contact the Sammons Retirement Solutions Sales Desk at 855-624-0201  
with questions about this form and its use.**

## Product Information

### LiveWell® Guarantee Annuity

Guarantee Period (Years):                      3                              5                              7                              10

### LiveWell® Preferred Fixed Index Annuity

Select Rider Option:                              No Rider  
     Guaranteed Minimum Death Benefit (GMDB)  
     Guaranteed Lifetime Withdrawal Benefit (GLWB)  
     Age to begin withdrawals for GLWB:

Payout Selection:                                      Single                              Joint

Index Options	S&P 500® Index	S&P 500® Low Volatility Daily Risk Control 5% Index	Fidelity Multifactor Yield Index 5% ER <sup>SM</sup>	Fixed Account
Crediting methods	% Annual point-to-point w/ index cap rate	% Annual point-to-point w/ index margin  % Annual point-to-point w/ participation rate  % Two-year point-to-point w/ participation rate	% Annual point-to-point w/ participation rate  % Two-year point-to-point w/ participation rate	%

### LiveWell® Mutual Fund IRA

#### LiveWell® Plus Mutual Fund IRA

Include Investment Detailed Report (IDR)?

Rebalance Selection:

Model Selection (*powered by Morningstar Investment Management*):

Asset class breakdown: Equity/Fixed

Non-Model Options

Tickers:

Sub Accounts:

<sup>1</sup> In CA, DE, and FL, guarantee periods 7 and 10 are not available.

## LiveWell® Variable Annuity

Include Investment Detailed Report (IDR)?

Rebalance Selection:

Model Selection (*powered by Morningstar Investment Management*):

Asset class breakdown: Equity/Fixed

Non-Model Options

Tickers:

Sub Accounts:

Optional LiveWell® Value Endorsement?

Optional LiveWell® Enhanced Death Benefit?



**Investing in mutual funds and variable annuities involves risk, including potential loss of investment. You and your client should consider the investment objectives, risks, charges, and expenses of the mutual fund or variable annuity and its underlying investment options carefully before investing. The prospectus and/or summary prospectus contain this and other information. You or your client can visit [srlivewell.com/prospectus](http://srlivewell.com/prospectus) or call 866-747-3421 to obtain a current prospectus for the mutual fund or the variable annuity and its underlying investment options. Inform investors to carefully read the prospectus before investing.**

**Variable Annuities are designed for long-term investing, such as retirement investing and are subject to market risk including loss of principal.**

Securities distributed by Sammons Financial Network®, LLC., member FINRA. Insurance products are issued by Midland National® Life Insurance Company (West Des Moines, IA). Sammons Institutional Group<sup>SM</sup>, Inc. provides administrative services. Sammons Financial Network®, LLC., Midland National® Life Insurance Company and Sammons Institutional Group<sup>SM</sup>, Inc., are wholly owned subsidiaries of Sammons® Financial Group, Inc. Sammons Retirement Solutions® and Midland Retirement Distributors® are marketing divisions of Sammons Institutional Group<sup>SM</sup>, Inc.

IRAs are considered a long-term investment. Withdrawals from a Traditional or SEP-IRA are generally subject to income taxes, and if taken before age 59½, may be subject to an additional 10% IRS tax penalty. Withdrawals from a Roth IRA are generally not subject to income tax provided certain requirements are met. Information on Traditional, Roth, and SEP-IRAs is available in the LiveWell® Mutual Fund IRA or LiveWell® Plus Mutual Fund IRA disclosure.

Sammons Institutional Group<sup>SM</sup>, Inc. and Sammons Financial Network®, LLC., member FINRA, do not give tax, legal, or investment advice. Please have your client consult with and rely on their own tax, legal, or investment professional(s). Taxes are payable upon withdrawal of funds, and a 10% IRS penalty may apply to withdrawals prior to age 59½.

UMB Bank n.a. is the custodian for the LiveWell® Mutual Fund IRA Series. The mutual funds offered through the LiveWell® Mutual Fund IRA Series are made available through Sammons Financial Network®, LLC., member FINRA, 4546 Corporate Drive, Suite 100, West Des Moines, IA 50266. Information about the LiveWell® Mutual Fund IRA Series and its funds can be obtained by calling 866-747-3421. Sammons Financial Network®, LLC., member FINRA, Sammons Institutional Group<sup>SM</sup>, Inc., and Sammons Retirement Solutions® (a marketing division of Sammons Institutional Group) are not affiliated with UMB Bank n.a.

Asset Allocation (and/or diversification) does not ensure a profit or guarantee against loss; it is a method used to help manage risk.

Morningstar Investment Management LLC is a registered investment adviser and subsidiary of Morningstar, Inc. Morningstar Investment Management provides nondiscretionary consulting services to Sammons Institutional Group<sup>SM</sup>, Inc. (SIG) but is not acting in the capacity of adviser to individual investors. Morningstar Investment Management provides recommendations to SIG regarding asset allocation targets, for certain LiveWell® products/programs, which are subject to change without notice. Morningstar Investment Management establishes the allocations using its proprietary asset classifications. If alternative classification methods are used, the allocations may not meet the asset allocation targets. The Morningstar name and logo are registered marks of Morningstar, Inc. Morningstar Investment Management is not affiliated with SIG.

Sammons Institutional Group<sup>SM</sup>, Inc. and its affiliated companies do not give tax, legal, or investment advice. Please have your client consult with and rely on their own tax, legal, or investment advisor(s). Taxes are payable upon withdrawal of funds, and a 10% IRS penalty may apply to withdrawals prior to age 59½. Fixed Index Annuities are not a direct investment in the stock market. They are long-term insurance products with guarantees backed by the issuing company. They provide the potential for interest to be credited based in part on the performance of specific indices, without the risk of loss of premium due to market downturns or fluctuation. They may not be appropriate for all clients.

Certain withdrawals taken will impact the Accumulation Value, GLWB Amount and GLWB Value. Withdrawals taken prior to age 59½ may be subject to IRS penalties.

Rider cost is based on GLWB Value or GMDB Value. Annual rider cost is deducted from the Accumulation Value each contract anniversary.

NOT FDIC/NCUA INSURED, MAY LOSE VALUE INCLUDING LOSS OF PRINCIPAL, NO BANK/CU GUARANTEE, NOT A DEPOSIT, NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY.