

FocusOn®:

# Income for Life

I M A G E L I S T

<b>0010</b> Welcome	<b>0250</b> <b>Trends and Strategies</b>
<b>0020</b> Workshop Objectives	<b>0260</b> Payout Options
<b>0030</b> Our Commitment	<b>0280</b> Annuities and Investing
<b>0040</b> Evaluation Form	<b>0290</b> Annuities Provide Other Benefits
<b>0050</b> About Your Workbook	<b>0300</b> Supplementary Retirement Plan
<b>0060</b> Financial Challenges	<b>0310</b> Accessing Funds in an Annuity
<b>0070</b> <b>Annuities for an Income You Can't Outlive</b>	<b>0320</b> 1035 Exchange
<b>0080</b> Income You Can't Outlive — The Annuity	<b>0330</b> Split Annuity
<b>0090</b> What Is an Annuity?	<b>0331</b> Income Today, Income Tomorrow
<b>0100</b> Types of Annuities	<b>0340</b> Estate Conservation Issues
<b>0110</b> Deferred Annuity	<b>0350</b> <b>Case Studies</b>
<b>0120</b> How Deferred Annuities Work	<b>0360</b> Case Study — The Millers
<b>0130</b> Tax-Deferred Compounding	<b>0370</b> Case Study — The Millers
<b>0131</b> Taxes Make a Difference	<b>0380</b> Case Study — Carol Walker
<b>0140</b> Immediate Annuity	<b>0390</b> Case Study — Carol Walker
<b>0150</b> How Immediate Annuities Work	<b>0400</b> <b>Important Questions</b>
<b>0160</b> How Annuities Earn Interest	<b>0410</b> Four Important Questions
<b>0170</b> Fixed Annuity	<b>0420</b> Is an Annuity Appropriate for You?
<b>0180</b> Variable Annuity	<b>0430</b> Annuity Costs
<b>0181</b> Historical Investment Performance	<b>0440</b> Additional Considerations
<b>0200</b> Indexed Annuity	<b>0450</b> Should You Choose a Fixed Annuity or a Variable Annuity?
<b>0205</b> Longevity Insurance	<b>0451</b> Should You Choose a Fixed Annuity or a Variable Annuity? <i>(workbook exercise)</i>
<b>0206</b> Longevity Insurance in a Qualified Retirement Plan	<b>0460</b> How Do You Allocate a Variable Annuity?
<b>0210</b> <b>Tax Considerations</b>	<b>0470</b> Allocating a Variable Annuity
<b>0220</b> Annuities and Taxes	<b>0480</b> The Investment Spectrum
<b>0230</b> The Effects of Taxes and Inflation	<b>0481</b> Assessing Your Risk Tolerance <i>(workbook exercise)</i>
<b>0240</b> Penalties and Surrender Charges	

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## I M A G E L I S T

- 0490** How Do You Select an Insurance Company?
- 0500** Selecting an Insurance Company
- 0510** Annuities and Financial Challenges
- 0520** Annuities and Creative Solutions
- 0530** Where Do You Go from Here?
- 0540** Where Do You Go from Here?
- 0550** Evaluation Form
- 0560** What to Bring
- 0570** Thank You