

Income for Life

I M A G E L I S T

0010 Welcome	0250 Trends and Strategies
0020 Workshop Objectives	0260 Payout Options <i>Bonus calculator</i>
0030 Our Commitment	0270 Investing <i>Bonus slide</i>
0040 Evaluation Form	0280 Annuities and Investing
0050 About Your Workbook	0290 Annuities Provide Other Benefits
0060 Financial Challenges	0300 Supplementary Retirement Plan
0070 Annuities for an Income You Can't Outlive	0310 Accessing Funds in an Annuity
0080 Income You Can't Outlive — The Annuity <i>Bonus slide</i>	0320 1035 Exchange
0090 What Is an Annuity?	0330 Split Annuity <i>Bonus slide</i>
0100 Types of Annuities	0340 Estate Conservation Issues
0110 Deferred Annuity	0350 Case Studies
0120 How Deferred Annuities Work	0360 Case Study — The Millers
0130 Tax-Deferred Compounding <i>Bonus slide</i>	0370 Case Study — The Millers
0140 Immediate Annuity	0380 Case Study — Carol Walker
0150 How Immediate Annuities Work <i>Bonus calculator</i>	0390 Case Study — Carol Walker
0160 How Annuities Earn Interest	0400 Important Questions
0170 Fixed Annuity	0410 Four Important Questions
0180 Variable Annuity	0420 Is an Annuity Appropriate for You?
0190 Variable Annuity Disclosure	0430 Annuity Costs
0200 Indexed Annuity	0440 Additional Considerations
0205 Longevity Insurance	0450 Should You Choose a Fixed Annuity or a Variable Annuity? <i>Bonus workbook exercise</i>
0206 Longevity Insurance in a Qualified Retirement Plan	0460 How Do You Allocate a Variable Annuity?
0210 Tax Considerations	0470 Allocating a Variable Annuity
0220 Annuities and Taxes	0480 The Investment Spectrum <i>Bonus workbook exercise</i>
0230 The Effects of Taxes and Inflation	0490 How Do You Select an Insurance Company?
0240 Penalties and Surrender Charges	

FocusOn®:

Income for Life

I M A G E L I S T

- 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

Bonus features

For Slide 0080:

- 0580** Centenarians Grow in Number

For Slide 0130:

- 0590** Taxes Make a Difference

For Slide 0150:

- 0600** Calculating Income from an Immediate Fixed Annuity (*calculator*)

For Slide 0260:

- 0620** Guaranteed Retirement Income (*calculator*)

For Slide 0270:

- 0630** Historical Investment Performance

For Slide 0330:

- 0640** Income Today, Income Tomorrow

For Slide 0450:

- 0650** Should You Choose a Fixed or Variable Annuity?
(*workbook exercise*)

For Slide 0480:

- 0660** Assessing Your Risk Tolerance
(*workbook exercise*)