



ANNUITY ADVANCED STRATEGIES

Income within 1 - 10 years

Carrier/Product	Rating	Issue Ages	Minimum Premium	Withdrawals		Bonus/Benefit Base Crediting	Income Type	Enhanced Death Benefit?	LTC Riders?	
Allianz 360 10	A+	80	NQ	20,000	Year 1	0%	25% Annual Interest Bonus (AIB)	Level	Accumulation Value including 25% AIB	N/A
			Q		Years 2+	10%		Increasing		
Allianz Benefit Control 10	A+	80	NQ	20,000	Year 1	0%	18% 1 st Year Benefit Base Bonus	Increasing	Benefit Base Payout 5 - 30 years (Max 250% of Premium)	Income Doubles
			Q		Years 2+	10%	Accelerated: 50% PAR 150% AIB Balanced: 100% PAR 50% AIB			
American Equity Income Shield 10	A-	80	NQ	5,000	Year 1	Int	7% 1 st Year Premium Bonus	Level	N/A	Waiver of Surrender (Issue Ages 0 – 75)
			Q		Years 2+	10%	Refer to Fact Sheet for Rollup Options			
Global Atlantic Income 150+ SE 10	A	85	NQ	10,000	Year 1	10%	150% Benefit Base Bonus in year 10 if income has not been started. Calculated based on Accumulation Value.	Level	N/A	Income Doubles (5 Years Max) & Waiver of Surrender
			Q		Years 2+					
Great American Premier Income 7	A+	85	NQ	10,000	Year 1	10%	6% Benefit Base Bonus	Level	N/A	Waiver of Surrender
			Q		Years 2+		6% Simple 10 Year Rollup			
North American Benefit Solutions 10	A+	79	NQ	20,000	Year 1	0%	20% Bonus Years 1, 5, 10	Level	Benefit Base Payout 5 Years	Yes
			Q		Years 2+			5%		
Prudential SurePath Income 10	A+	85	NQ	25,000	Year 1	10%	5% Benefit Base Bonus	Level	N/A	N/A
			Q		Years 2+		7% Simple 10 Year Rollup			
Sentinel Security Summit Bonus 10	B++	85	NQ	5,000	Year 1	0%	Up to a 10% Premium Bonus	Level	Optional Benefit Base Payout 5 Years	Income Doubles (5 Years Max)
			Q		Years 2+		10%			

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ANNUITY ADVANCED STRATEGIES

Income Years 10+

Carrier/Product	Rating	Issue Ages	Minimum Premium	Withdrawals		Bonus/Benefit Base Crediting	Income Type	Enhanced Death Benefit?	LTC Riders?
Allianz 222 10	A+	80	NQ 20,000	Year 1	0%	15% 1 st Year Benefit Base Bonus	Increasing	Benefit Base Payout 5 - 30 years	Income Doubles
				Years 2+	10%	50% Annual Interest Bonus (AIB)			
Allianz Benefit Control 10	A+	80	NQ 20,000	Year 1	0%	18% 1 st Year Benefit Base Bonus	Increasing	Benefit Base Payout 5 - 30 years (Max 250% of Premium)	Income Doubles
				Years 2+	10%	Accelerated: 50% PAR 150% AIB Balanced: 100% PAR 50% AIB			
American Equity Income Shield 10	A-	80	NQ 5,000	Year 1	Int	7% 1 st Year Premium Bonus	Level	N/A	Waiver of Surrender (Issue Ages 0 – 75)
				Years 2+	10%	Refer to Fact Sheet for Rollup Options			
American National Century Plus 7, 10 Fixed Annuity	A	85	NQ 5,000	Year 1	10%	5% 1 st Year Interest Enhancer 1.8% Annual Fixed Rate of Return	Level	N/A	Waiver of Surrender
				Years 2+		7.2% Simple 10 Year Rollup			
Athene Agility 10	A	80	NQ 10,000	Year 1	10%	20% 1 st Year Benefit Base Bonus	Increasing	Benefit Base Payout 5 Years	Income Doubles (180 Day Wait) (Facility Only)
				Years 2+		75% Annual Interest Bonus (AIB)			
Delaware Life Assured Income 7	A-	80	NQ 25,000	Year 1	0%	9% Simple 10 Year Rollup	Level	N/A	Waiver of Surrender
				Years 2+	10%				
North American Benefit Solutions 10	A+	79	NQ 20,000	Year 1	0%	20% Benefit Base Bonus Years 1, 5, 10	Level	Benefit Base Payout 5 Years	Yes
				Years 2+	5%		Increasing		
Sentinel Security Guaranteed Income 10	B++	85	NQ 5,000	Year 1	0%	Up to a 10% Premium Bonus	Level	Optional Benefit Base Payout 5 Years	Income Doubles (5 Years Max)
				Years 2+	10%	Refer to Fact Sheet for Rollup Options			

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ANNUITY ADVANCED STRATEGIES

Accumulation

Carrier/Product	Rating	Issue Ages	Minimum Premium		Withdrawals		Premium Bonus	LTC Riders?
AIG Power Select Builder 8, 10	A+	8: 80 10: 78	NQ	25,000	Year 1	0%	4% Premium Bonus (8 Year Only)	Waiver of Surrender
			Q		Years 2+	8: 5% 10: 10%		
American Equity Asset Shield 10	A-	80	NQ	5,000	Year 1	0%	N/A	Waiver of Surrender
			Q		Years 2+	10%		
Athene Performance Elite Plus 10	A	78	NQ	10,000	Year 1	Up to 20%	Ages 0-64: 10% Premium Bonus Ages 65-78: 9% Premium Bonus	Waiver of Surrender
			Q		Years 2+			
Brighthouse Secure Advantage 6	A	80	NQ	50,000	Year 1	10%	N/A	Waiver of Surrender
			Q		Years 2+			
Great American Landmark 5	A+	89	NQ	10,000	Year 1	10%	N/A	Waiver of Surrender
			Q		Years 2+			
Great American Legend 7	A+	85	NQ	10,000	Year 1	10%	N/A	Waiver of Surrender
			Q		Years 2+			
Great American Safe Return 10	A+	85	NQ	25,000	Year 1	10%	N/A	Waiver of Surrender
			Q		Years 2+			
North American Versa Choice 10	A+	79	NQ	20,000	Year 1	10%	N/A	Optional Rider Includes: ROP, Waiver of Surrender, 20% Free Withdrawals, 125% AV Enhancer (5yr Payout)
			Q		Years 2+			
Prudential SurePath 7, 10	A+	85	NQ	25,000	Year 1	0%	N/A	N/A
			Q		Years 2+	10%		

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ANNUITY ADVANCED STRATEGIES

MYGA Accumulation

Carrier/Product	Rating	Issue Ages	Band Type	Minimum Premium	3 Year	5 Year	7 Year	Notes	
Atlantic Coast Life Safe Haven	B++	90	Low Band	NQ	5,000		3.25%	3.34%	free withdrawals reduces rate
			High Band	Q					
Fidelity & Guaranty Guarantee Platinum	A-	90	Low Band	NQ	20,000	2.1%	2.75%	2.9%	Free Withdrawals applies to interest
			High Band	Q					
Global Atlantic SecureFore	A	85	Low Band	NQ	10,000	1.75%	2.25%		10% Withdrawals beginning 2 nd Year
			High Band	Q					
North American Guarantee Choice	A+	90	Low Band	NQ	10,000	1.65%	2.10%	2.85%	Free Withdrawals applies to interest
				Q	2,000				
			High Band	NQ/Q	100,000	2.1%	2.40%	2.85%	

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