

The CARES Process™



As an annuity owner you anticipate that your current contract is efficiently and effectively meeting your long term financial goals. However, as time elapses and objectives shift, you may wonder if the product you have is still the best solution for your needs.

A PROACTIVE APPROACH

If you have concerns about your annuity, how it works, how its features meet your objectives, or whether there may be newer, better, more appropriate solutions, contact us. As specialists in Annuity Contracts, we are able help individuals nationwide with these challenges.

Our approach is based on The Comprehensive Annuity Review and Evaluation Service™—a professional process designed to educate contract holders on their products and features, employing analytical tools developed and managed by our nationally-recognized team of annuity experts.

TAKE THE NEXT STEPS

The CARES Process™ is a comprehensive review of your current contract.

- 1 It begins with a one page fact finding questionnaire to help you identify the ultimate purpose for the asset.
- 2 We then analyze and detail the current product features in context with the designated goal. A best fit benchmark is selected.
- 3 The CARES Report™ provides education on your selected objective and highlights features that have the largest impact on its achievement. By comparing your contract to a comparable benchmark product, available today, we can help you decide whether or not the policy is meeting your goals sufficiently.



We understand annuities can be complex; the CARES Process™ helps you gain the clarity you desire.