

NAIC Annuity Disclosure

Appendix B

Consumer Refusal To Provide Information

Do Not Sign Unless You Have Read and Understand the Information in this Form

Why are You being given this form?

You're buying a financial product – an annuity.

To recommend a product that effectively meets Your needs, objectives and situation, the agent, broker, or company needs information about You, Your financial situation, insurance needs, and financial objectives.

If You sign this form, it means You have not given the agent, broker, or company some or all the information needed to decide if the annuity effectively meets Your needs, objectives, and situation. You may lose protections under the Insurance Code of the state of _____ if You sign this form or provide inaccurate information.

Statement of Purchaser:

- I **refuse** to provide this information at this time.
- I have chosen to provide **limited** information at this time.

Customer Printed Name

Customer Signature

Date