



Summary of Care Solutions Products

Cash Lump Sum Brokerage Accounts CDs Life Insurance	NQ Annuities 1035 taxable growth to tax - free for LTC	Earned Income Pensions & RMDs VA Income Riders Annuization Income	IRAs 401k 403b Retirement Dollars
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AGES 35-39

Joint	Asset Care 3% = 33mo + Lifetime - Inflation: 3% for all yrs years on COB only **If 1035, see below	N/A	Asset Care 3% = 33mo + Lifetime - Inflation: 3% for all yrs years on COB only	N/A
Single	Asset Care 4% = 25mo + Lifetime - Inflation: 3% for all yrs years on COB only	N/A	Asset Care 4% = 25mo + Lifetime - Inflation: 3% for all yrs years on COB only	N/A

AGES 40-59

Joint	Asset Care 3% = 33mo + Lifetime - Inflation: 3% for 20 yrs OR all yrs on COB only **If 1035, see below	Indexed Annuity Care 30mo + Lifetime	Asset Care 3% = 33mo + Lifetime - Inflation: 3% for 20 yrs OR all yrs on COB only	Indexed Annuity Care 30mo + Lifetime Benefits are taxable
Single	Asset Care 4% = 25mo + Lifetime - Inflation: 3% for 20 yrs OR all yrs on COB only	Annuity Care II Indexed Annuity Care ANCII: 24mo + 36mo IANC: 24mo + 48mo	Asset Care 4% = 25mo + Lifetime - Inflation: 3% for 20 yrs OR all yrs on COB only	Indexed Annuity Care 24mo + 48mo Benefits are taxable

AGES 59 1/2 to 80

Joint	Asset Care 3% = 33mo + Lifetime - Inflation: None **If 1035, see below	Indexed Annuity Care 30mo + Lifetime	Asset Care 3% = 33mo + Lifetime - Inflation: None	Asset Care Qualified 3% = 33mo + Lifetime - Inflation: None
Single	Asset Care 4% = 25mo + Lifetime - Inflation: None	Annuity Care II Indexed Annuity Care ANCII: 24mo + 36mo IANC: 24mo + 48mo	Asset Care 4% = 25mo + Lifetime - Inflation: None	Asset Care Qualified 4% = 25mo + Lifetime - Inflation: None

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Joint	Indexed Annuity Care 30mo + Lifetime	Indexed Annuity Care 30mo + Lifetime	N/A	Indexed Annuity Care 30mo + Lifetime Benefits are taxable
Single	Indexed Annuity Care 24mo + 48mo	Indexed Annuity Care 24mo + 48mo	N/A	Indexed Annuity Care 24mo + 48mo Benefits are taxable

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**If 1035 from single, cannot be moved to joint policy unless moving to Asset-Care AFWL
Health Savings Accounts can be used to pay for Continuation of Benefits Rider. Please consult a tax advisor.