

Suitability Acknowledgement



LIFE INSURANCE COMPANY
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 888-352-5178 FAX: 888-352-5126

Thank you for your interest in an SILAC Life Insurance annuity. This form is provided to ensure compliance with the NAIC Suitability in Annuity Transactions model regulation or other state suitability regulation. **This entire form must be completed and submitted with the application.** The information you provide will be treated with the highest degree of confidentiality.

Owner's Name:	Are you still working? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Retired	Owner's Occupation: (If not working or retired, list most recent. If self-employed, please include line of work.
	Date of Birth:	Social Security Number:
Type of government issued photo ID: <input type="checkbox"/> Drivers License <input type="checkbox"/> Other _____ State or country of issue _____ <input type="checkbox"/> Passport Number _____		
Joint Owner's Name:	Are you still working? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Retired	Joint Owner's Occupation: (If not working or retired, list most recent. If self-employed, please include line of work.
	Date of Birth:	Social Security Number:
Type of government issued photo ID: <input type="checkbox"/> Drivers License <input type="checkbox"/> Other _____ State or country of issue _____ <input type="checkbox"/> Passport Number _____		
Proposed Product Premium: \$ _____		Surrender Charge Term: _____

Financial Information

Gross Monthly Household Income \$: _____ (Include all household income, i.e. spouse)	Monthly Expenses: \$: _____ (Total of ALL household expenses, including rent/mortgage, bills, debt payments and food)	Approximate Total Net Worth: \$: _____ (Do not include primary residence, personal belongings, or personal property such as jewelry, furnishings, and vehicle)	Liquid Assets after Annuity Purchase: \$: _____ (Checking, savings, money market funds, and securities that can be sold without penalties)
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Assets: The total assets listed in this table (liquid and non-liquid) should equal the **Total Net Worth** listed above. If you are over 59½ and assets are qualified they should be listed under liquid assets.

Liquid Assets		Non-Liquid Assets	
Asset Type	Current Value	Asset Type	Current Value
Checking Account	\$ _____	Annuities in Surrender Period	\$ _____
Savings Account	\$ _____	Retirement Plan (401K, Pension,etc)	\$ _____
Certificate of Deposit	\$ _____	Stocks/Bonds/Mutual Funds	\$ _____
Annuities that are surrender free	\$ _____	Real Estate (other than primary residence)	\$ _____
Annuities free withdrawals	\$ _____	Life Insurance Cash Value	\$ _____
Stocks/Bonds/Mutual Funds	\$ _____	Other:	\$ _____
Other:	\$ _____	Other:	\$ _____
Other:	\$ _____	Other:	\$ _____
Total:	\$ 0.00	Total:	\$ 0.00