Tax, Retirement & Estate Planning Inquiry

Complete this form, "save as" to a local folder and forward as an attachment to:

- wholesaler if you are an advisor to optimize triage or
- member of Tax, Retirement & Estate Planning Team if you are a member of the Retail Sales Team

Reset Form

Submitted by: **Date:**

Source of Question (e.g. Advisor name, Agency, Client name, etc.)**:** **Advisor code:**

Type of Inquiry:

○ Insurance ○ Investment ○ Crosses products ○ Technical/advanced ○ Marketing support

Question:

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Response:

Note: We may require additional information when running illustrations and concepts. Please run a sample illustration and concept for an idea of extra information needed. Alternatively, send us a pdf what you have done and use this form to provide direction on how we may help you.

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