

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

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:

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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