

# Single Premium Immediate Annuities

Prepared for: Annuitant, Primary

June 10, 2013

Prepared by: [Advisor Name]

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## Section 1 - Owner Information

### Sole Ownership

Annuitant	Prepared For	Date of Birth	Age	Gender
Primary	Annuitant, Primary	May 11, 1949	64	Male

## Section 2 - Source of Funds Information

Fund Type	Name of Transferor	Tax Status	Applicable Pension Legislation	Amount
Non Reg.	Company 1	Non-registered	Ontario	\$130,000.00

## Section 3 - Deposit Information

Purchase Date	Single Premium	Annual Indexing Rate	Payment Frequency	Payment Start Date
July 1, 2013	\$130,000.00	0.00%	Monthly	August 1, 2013

## Section 4 - Plan Information

Plan Type	Guaranteed Period Year	Guaranteed Period Month	Last Guaranteed Pay Date	Periodic Income	Annual Taxable Amount
Single life Guaranteed	5	0	July 1, 2018	\$667.89	\$815.60

**Illustration Date:** June 10, 2013

**This quotation is based on the current date and the interest rate (used to calculate the annuity payment) is guaranteed only if:**

1. The signed application is received at Our Head Office within 5 business days after the quote illustration date.
2. Non-Registered funds must be received with the application; Registered funds must be received within 45 business days after the quote illustration date.
3. For single life only/joint life only without a guarantee period the acknowledgement section has been completed in the SPIA Application.
4. **Purchase date is the date Our Head Office received all funds.**

**Note: Any changes (i.e. the date all funds received at Our Head Office (Purchase date), Single Premium Amount and/or First Pay Date etc.) to this quote will result in a change in the annuity payment.**

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