

# Single Premium Immediate Annuities

Prepared for:  
Annuitant, Primary  
January 18, 2019  
Prepared by: [Advisor Name]

1 of 1

## Section 1 - Owner Information

### Sole Ownership

Annuitant	Prepared For	Date of Birth	Age	Gender at Birth
Primary	Annuitant, Primary	November 25, 1956	62	Male

## Section 2 - Source of Funds Information

Fund Type	Name of Transferor	Tax Status	Applicable Pension Legislation	Amount
RRSP	Company 1	Registered	Ontario	\$150,000.00

## Section 3 - Deposit Information

Purchase Date	Single Premium	Annual Indexing Rate	Payment Frequency	Payment Start Date
February 1, 2019	\$150,000.00	0.00%	Monthly	February 1, 2019

## Section 4 - Plan Information

Plan Type	Guaranteed Period Year	Guaranteed Period Month	Last Guaranteed Pay Date	Periodic Income	Annual Taxable Amount
Single life Guaranteed	10	0	January 1, 2029	\$678.07	\$8,136.84

**Illustration Date:** January 18, 2019

**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.**

This illustration is not valid without all pages. This illustration is not an offer to provide insurance, nor is it an insurance contract. It has been prepared for information purposes only, and will not form part of any contract when issued. It is intended to demonstrate features based on specific assumptions that are not guaranteed. E.&O.E