

# Single Premium Immediate Annuities

Prepared for:  
Annuitant, Primary  
February 21, 2024  
Prepared by: [Advisor Name]

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## Section 1 - Owner Information

### Sole Ownership

| Annuitant | Prepared For       | Date of Birth    | Age | Gender at Birth |
|-----------|--------------------|------------------|-----|-----------------|
| Primary   | Annuitant, Primary | January 21, 1954 | 70  | Male            |

## Section 2 - Source of Funds Information

| Fund Type | Name of Transferor | Tax Status | Applicable Pension Legislation | Amount       |
|-----------|--------------------|------------|--------------------------------|--------------|
| RRSP      | Company 1          | Registered | Ontario                        | \$350,000.00 |

## Section 3 - Deposit Information

| Purchase Date | Single Premium | Annual Indexing Rate | Payment Frequency | Payment Start Date |
|---------------|----------------|----------------------|-------------------|--------------------|
| March 1, 2024 | \$350,000.00   | 0.00%                | Monthly           | March 24, 2024     |

## 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                       | February 24, 2034        | \$2,079.73      | \$24,956.76           |

**Illustration Date:** February 21, 2024

**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