



T h e S w i s s G u a r d S o l u t i o n TM

Request For Proposal

Fill out this brief questionnaire and mail or fax it to our office. You will receive your Swiss franc annuity quotation(s) directly from Switzerland in 5 to 10 days.

This is not an application for the purchase of a Swiss Annuity. It is only a request on your part for a no-cost, no-obligation quotation from a Swiss life insurance company.

Please be assured that all information you send is strictly confidential.

PLEASE PRINT OR TYPE

Applicant	Co-Applicant (optional: joint applicants only)
Full Name _____	Full Name _____
Date of Birth: mo ____ day ____ yr _____	Date of Birth: mo ____ day ____ yr _____
Male ____ Female ____	Male ____ Female ____
Citizen of U.S.: Yes ____ No ____	Citizen of U.S.: Yes ____ No ____
Address: Street _____	
City _____	State _____ Zip _____
Telephone _____	Fax _____

PLEASE ANSWER ALL QUESTIONS

- I would like a quotation on a (check one):
 - lump-sum (single premium) annuity
 - annual premium annuity, with equal premium payments for ____ years
- I would like my Swiss annuity to have a maturity (duration) of ____ years.
- I would like to invest the following amount (minimum of US \$100,000) (choose one):
 - lump sum premium of \$ _____
 - annual premium payments of \$ _____ per year.
- My investment will come from (choose one):
 - personal savings (e.g., savings account, money market)
 - a transfer of funds from my IRA or qualified retirement plan
 - a tax-free exchange from an annuity I currently own
 - a transfer of funds from my 403(b) tax-sheltered annuity
- I would like my quotation(s) to be sent to me via (check one):
 - Mail
 - Fax
 - E-Mail _____