



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

Swiss Annuity Suitability Questionnaire

Circle the number that corresponds to the answer you agree with the most.

QUESTION	Yes	Not Sure	No
1. Protecting my capital from loss is as important to me as making it grow.	2	1	0
2. Protecting my capital from taxes is important to me.	2	1	0
3. The value of my private pension plans (e.g., IRA, 401K, KEOGH, 403B) will exceed \$100,000 at retirement.	2	1	0
4. I (or my spouse) work in a high-liability profession.	2	1	0
5. I currently have less than 20 percent of my investment capital in non-U.S. currency.	2	1	0
6. I think Social Security and Medicare benefits will be reduced during the next ten years.	2	1	0
7. Investment privacy is important to me.	2	1	0
8. I will be able to leave most of the principal in a Swiss Annuity for at least five years.	2	1	0
9. I believe that during the next ten years the U.S. dollar will continue to weaken.	2	1	0
10. I think the federal government will continue to engage in deficit spending.	2	1	0
11. I think taxes on private pensions and estates will increase during my lifetime.	2	1	0
12. Establishing asset protection strategies that will benefit my family is important to me.	2	1	0

TOTAL SCORE _____

Suitability for a Swiss Annuity

- 0-6 Low
- 7-12 Moderate
- 13-18 High
- 19-24 Extremely High