



MULTI-YEAR GUARANTEED ANNUITIES

Prepared for
Valued Client














Prepared by
Kiara Caudill

Prepared on
10/31/2021 17:07

Annuity issued at age **67** in **PA** with **\$50,000** initially invested
















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Carrier	Annuity	Free Withdrawals	GTD Yield	Ending Value
2 SURRENDER YEARS				
 A-	MVA Harbourview	1st None 2nd+ 10%	1.8%	\$51,816
 B+	MVA Secure Savings	1st Interest 2nd+ 5%	1.75%	\$51,765
3 SURRENDER YEARS				
 A-	MVA Harbourview	1st None 2nd+ 10%	2.35%	\$53,608
 A-	MVA Bankers Elite 3	None	2%	\$53,060
 A-	MVA Guarantee Platinum	Interest	1.95%	\$52,982
4 SURRENDER YEARS				
 A-	MVA Harbourview	1st None 2nd+ 10%	2.6%	\$55,406
 B+	MVA Nassau Simple Annuity	5%	2.5%	\$55,191
 A	MVA Multi-Select MYGA	1st Interest 2nd+ 10%	2.35%	\$54,868
5 SURRENDER YEARS				
 B++	MVA Personal Choice	None	3.15%	\$58,387
 B+	MVA Nassau MYAnnuity	None	2.8%	\$57,403
 B+	MVA Secure Savings	1st Interest 2nd+ 5%	2.7%	\$57,124
6 SURRENDER YEARS				
 A-	MVA Harbourview	1st None 2nd+ 10%	2.9%	\$59,356
 A	MVA Multi-Select MYGA	1st Interest 2nd+ 10%	2.85%	\$59,183

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Carrier	Annuity	Free Withdrawals	GTD Yield	Ending Value
 B+	MVA Nassau Simple Annuity	5%	2.8%	\$59,010
7 SURRENDER YEARS				
 B++	MVA Personal Choice	None	3.2%	\$62,334
 A-	MVA Harbourview	1st None 2nd+ 10%	2.95%	\$61,285
 B+	MVA Nassau MYAnnuity	None	2.9%	\$61,077
8 SURRENDER YEARS				
 A	MVA Multi-Select MYGA	1st Interest 2nd+ 10%	3%	\$63,339
 B++	MVA Guaranty Rate Lock	1st None 2nd+ 5%	2.65%	\$61,637
 B++	MVA Preserve MYGA	1st Interest 2nd+ 10%	2.5%	\$60,920
9 SURRENDER YEARS				
 A-	MVA Bankers Elite 9	None	3%	\$65,239
 A	MVA Multi-Select MYGA	1st Interest 2nd+ 10%	2.9%	\$64,671
 B++	MVA Guaranty Rate Lock	1st None 2nd+ 5%	2.9%	\$64,671
10 SURRENDER YEARS				
 B++	MVA Personal Choice	None	3.25%	\$68,845
 A-	MVA Harbourview	1st None 2nd+ 10%	3.05%	\$67,523
 A	MVA Multi-Select MYGA	1st Interest 2nd+ 10%	2.95%	\$66,870

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2 SURRENDER YEARS

 **A-** Oceanview

Harbourview		MVA
GUARANTEED ENDING VALUE \$51,816		
COMPOUND INTEREST 1.8%		
GUARANTEED YIELD TO SURRENDER 1.8%		
FREE WITHDRAWALS		
First year	Years 2+	
None	10%	

 **B+** SILAC

Secure Savings		MVA
GUARANTEED ENDING VALUE \$51,765		
COMPOUND INTEREST 1.75%		
GUARANTEED YIELD TO SURRENDER 1.75%		
FREE WITHDRAWALS		
First year	Years 2+	
Interest only	5%	

3 SURRENDER YEARS

 **A-** Oceanview

Harbourview		MVA
GUARANTEED ENDING VALUE \$53,608		
COMPOUND INTEREST 2.35%		
GUARANTEED YIELD TO SURRENDER 2.35%		
FREE WITHDRAWALS		
First year	Years 2+	
None	10%	

 **A-** LBL

Bankers Elite 3		MVA
GUARANTEED ENDING VALUE \$53,060		
COMPOUND INTEREST 2%		
GUARANTEED YIELD TO SURRENDER 2%		
FREE WITHDRAWALS None		

 **A-** F&G

Guarantee Platinum		MVA
GUARANTEED ENDING VALUE \$52,982		
COMPOUND INTEREST 1.95%		
GUARANTEED YIELD TO SURRENDER 1.95%		
FREE WITHDRAWALS Interest only		

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4 SURRENDER YEARS

 **A-** Oceanview

Harbourview	MVA
GUARANTEED ENDING VALUE \$55,406	
COMPOUND INTEREST 2.6%	
GUARANTEED YIELD TO SURRENDER 2.6%	
FREE WITHDRAWALS First year None Years 2+ 10%	

 **B+** Nassau

Nassau Simple Annuity	MVA
GUARANTEED ENDING VALUE \$55,191	
COMPOUND INTEREST 2.5%	
GUARANTEED YIELD TO SURRENDER 2.5%	
FREE WITHDRAWALS 5%	

 **A** Oxford Life

Multi-Select MYGA	MVA
GUARANTEED ENDING VALUE \$54,868	
COMPOUND INTEREST 2.35%	
GUARANTEED YIELD TO SURRENDER 2.35%	
FREE WITHDRAWALS First year Interest only Years 2+ 10%	

5 SURRENDER YEARS

 **B++** Sentinel

Personal Choice	MVA
GUARANTEED ENDING VALUE \$58,387	
COMPOUND INTEREST 3.15%	
GUARANTEED YIELD TO SURRENDER 3.15%	
FREE WITHDRAWALS None	

 **B+** Nassau

Nassau MYAnnuity	MVA
GUARANTEED ENDING VALUE \$57,403	
COMPOUND INTEREST 2.8%	
GUARANTEED YIELD TO SURRENDER 2.8%	
FREE WITHDRAWALS None	

 **B+** SILAC

Secure Savings	MVA
GUARANTEED ENDING VALUE \$57,124	
COMPOUND INTEREST 2.7%	
GUARANTEED YIELD TO SURRENDER 2.7%	
FREE WITHDRAWALS First year Interest only Years 2+ 5%	

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6 SURRENDER YEARS

 **A-** Oceanview

Harbourview MVA	
GUARANTEED ENDING VALUE \$59,356	
COMPOUND INTEREST 2.9%	
GUARANTEED YIELD TO SURRENDER 2.9%	
FREE WITHDRAWALS	
First year None	Years 2+ 10%

 **A** Oxford Life

Multi-Select MYGA MVA	
GUARANTEED ENDING VALUE \$59,183	
COMPOUND INTEREST 2.85%	
GUARANTEED YIELD TO SURRENDER 2.85%	
FREE WITHDRAWALS	
First year Interest only	Years 2+ 10%

 **B+** Nassau

Nassau Simple Annuity MVA	
GUARANTEED ENDING VALUE \$59,010	
COMPOUND INTEREST 2.8%	
GUARANTEED YIELD TO SURRENDER 2.8%	
FREE WITHDRAWALS 5%	

7 SURRENDER YEARS

 **B++** Sentinel

Personal Choice MVA	
GUARANTEED ENDING VALUE \$62,334	
COMPOUND INTEREST 3.2%	
GUARANTEED YIELD TO SURRENDER 3.2%	
FREE WITHDRAWALS None	

 **A-** Oceanview

Harbourview MVA	
GUARANTEED ENDING VALUE \$61,285	
COMPOUND INTEREST 2.95%	
GUARANTEED YIELD TO SURRENDER 2.95%	
FREE WITHDRAWALS	
First year None	Years 2+ 10%

 **B+** Nassau

Nassau MYAnnuity MVA	
GUARANTEED ENDING VALUE \$61,077	
COMPOUND INTEREST 2.9%	
GUARANTEED YIELD TO SURRENDER 2.9%	
FREE WITHDRAWALS None	

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8 SURRENDER YEARS

 **A** Oxford Life

Multi-Select MYGA	MVA
GUARANTEED ENDING VALUE \$63,339	
COMPOUND INTEREST 3%	
GUARANTEED YIELD TO SURRENDER 3%	
FREE WITHDRAWALS First year Interest only Years 2+ 10%	

 **B++** GILICO

Guaranty Rate Lock	MVA
GUARANTEED ENDING VALUE \$61,637	
COMPOUND INTEREST 2.65%	
GUARANTEED YIELD TO SURRENDER 2.65%	
FREE WITHDRAWALS First year None Years 2+ 5%	

 **B++** Guggenheim

Preserve MYGA	MVA
GUARANTEED ENDING VALUE \$60,920	
COMPOUND INTEREST 2.5%	
GUARANTEED YIELD TO SURRENDER 2.5%	
FREE WITHDRAWALS First year Interest only Years 2+ 10%	

9 SURRENDER YEARS

 **A-** LBL

Bankers Elite 9	MVA
GUARANTEED ENDING VALUE \$65,239	
COMPOUND INTEREST 3%	
GUARANTEED YIELD TO SURRENDER 3%	
FREE WITHDRAWALS None	

 **A** Oxford Life

Multi-Select MYGA	MVA
GUARANTEED ENDING VALUE \$64,671	
COMPOUND INTEREST 2.9%	
GUARANTEED YIELD TO SURRENDER 2.9%	
FREE WITHDRAWALS First year Interest only Years 2+ 10%	

 **B++** GILICO

Guaranty Rate Lock	MVA
GUARANTEED ENDING VALUE \$64,671	
COMPOUND INTEREST 2.9%	
GUARANTEED YIELD TO SURRENDER 2.9%	
FREE WITHDRAWALS First year None Years 2+ 5%	

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10 SURRENDER YEARS

 **B++** Sentinel

Personal Choice MVA
GUARANTEED ENDING VALUE \$68,845
COMPOUND INTEREST 3.25%
GUARANTEED YIELD TO SURRENDER 3.25%
FREE WITHDRAWALS None

 **A-** Oceanview

Harbourview MVA
GUARANTEED ENDING VALUE \$67,523
COMPOUND INTEREST 3.05%
GUARANTEED YIELD TO SURRENDER 3.05%
FREE WITHDRAWALS First year Years 2+ None 10%

 **A** Oxford Life

Multi-Select MYGA MVA
GUARANTEED ENDING VALUE \$66,870
COMPOUND INTEREST 2.95%
GUARANTEED YIELD TO SURRENDER 2.95%
FREE WITHDRAWALS First year Years 2+ Interest only 10%

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