



# INDEXALYZER™ Report Request Form

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### 1. Performance Report Lists

With this report you can run list of products and crediting methods broken down in several different ways. You can use these reports to help you determine which products to offer or use them to help you solidify a sale.

### 2. 2 Year Allocation Strategy Supplement Reports

Agents have been using this allocation strategy for years, but they have never been able to illustrate it. Now you can! With this report you can demonstrate your mastery of the Fixed Indexed industry by showing a client that not only are they buying safety but maximized growth potential as well.

### 3. Carrier Comparison Reports

If you are in a competitive situation you can show how superior your product is with this report. You can also do some competitive analysis for pre-sale purposes. This is also a great way to show a client the power of diversity by splitting up their dollars between two or more great products.

### 4. Product Comparison Reports

You can use this report to compare several different products at a time. You will have the ability to demonstrate diversity or use this in a competitive situation. This is also a great report to show how possible future rate reductions could affect the client's over-all growth.

### 5. Crediting Method vs Stock Market Reports

If you have clients that are still emotionally tied to the stock market or any risky equities, this report will help get them off the fence. We can demonstrate how the best product crediting methods in the industry compare to the actual market.

### 6. IUL Allocation Reports

Until the full-blown version of INDEXALYZER IUL is ready, you can still use this report to guide your IUL clients into the best performing crediting methods available in their IUL.

### 7. Existing Policy Performance Reports

One of the most lucrative un-tapped market in our industry our current FIA owners. You can use this report to demonstrate the power of all the new index options that have been recently made available. This is a powerful way to help these clients get more growth out of their "safe" money.

### 8. Non-Guaranteed Income Rider Performance Reports

There is a new frontier of Income Rider products that have recently been introduced. The only problem is how to compare them. They are all roughly built the same way, with one difference...PERFORMANCE! This report will help you demonstrate the true way to compare these amazing products.

### 9. Index Family Reports

If you have a client or you yourself are partial towards a certain index, this report will show you all the products that use each index. You can compare each product based upon performance and know beyond a shadow of a doubt that you are offering the best product from each index family.

Print out the Report Request Form you desire, complete it, then

e-mail it to [info@indexannuityreturns.com](mailto:info@indexannuityreturns.com) or to your Sales Manger.



# INDEXALYZER™ Report Request Form

## Top 40 Reports On 10yr Back-Tested Performance History

AGENT NAME:	PHONE #:
E-MAIL ADDRESS:	APPOINTMENT DATE:

List Carriers You Want Included

Show All Carriers


\_\_\_ Your Client's Age    \_\_\_ State    \_\_\_ Lowest AM Best Rating

\_\_\_\_\_ Premium    \_\_\_\_\_ Tax Status

- Include Bonus Products
- Include Products With Fees
- Show 10/10/10 Compliant Products Only
- Include Annual Reset (1yr)
- Include Biennial Reset (2yr)
- Include Triennial Reset (3yr)
- Include Quinquennial Reset (5yr)
- Exclude Fee-Based (Non-Commissionable Products)
- Include Indices With Partial Hypothetical History
- Include MVA Products
- Include Products That Have Below 10% Free Withdrawals
- Include Products That Are Not RMD Friendly
- Show Flexible Premium Products Only
- Show Single Premium Products Only
- Show Both Flexible & Single Premium Products

List Carriers You Want Excluded


Draw Down (To account for possible future rate reductions)

- Show Only 0% Draw Down

Include The Following Draw Down Percentages:

\_\_\_ %    \_\_\_ %    \_\_\_ %    \_\_\_ %

Surrender Terms To Show:

\_\_\_16    \_\_\_15    \_\_\_14    \_\_\_13    \_\_\_12    \_\_\_11    \_\_\_10

\_\_\_9    \_\_\_8    \_\_\_7    \_\_\_6    \_\_\_5    \_\_\_4    \_\_\_3



# INDEXALYZER™ Report Request Form

## Product Comparison Reports

AGENT NAME:	PHONE #:
E-MAIL ADDRESS:	APPOINTMENT DATE:

Product #1	
Product #2	
Product #3	
Product #4	
Product #5	
Product #6	
Product #7	
Product #8	
Product #9	
Product #10	
Product #11	
Product #12	
Product #13	
Product #14	
Product #15	

State: \_\_\_\_\_ Premium: \$ \_\_\_\_\_ Surrender Period(s): \_\_\_\_\_

Notes:

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# INDEXALYZER™ Report Request Form

## Existing Policy Performance Report

AGENT NAME:	PHONE #:
E-MAIL ADDRESS:	APPOINTMENT DATE:

Existing Policy

CARRIER: \_\_\_\_\_ PRODUCT: \_\_\_\_\_

Enter the current rates being offered by existing carrier.

	INDEX	PAR	CAP	SPREAD	TRIGGER	FEE
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

Carriers and product's you want to compare to.

CARRIER	PRODUCT	CARRIER	PRODUCT



## Non-Guaranteed Income Rider Performance Report

AGENT NAME:	PHONE #:
E-MAIL ADDRESS:	APPOINTMENT DATE:

Select the products you want to be included in the report:

- Allianz 222
- American Equity Option 3
- Athene Agility
- Fidelity & Guarantee Life Retirement Pro
- North American Strategic Design X

Information about the client:

State: \_\_\_\_\_

Age: \_\_\_\_\_

Premium: \$ \_\_\_\_\_

Notes: