

# INDEXALYZER™ Report Request Form

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### **1. Top 25 Performance Reports**

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 stilled 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 either fax it to 817-274-4032 or

e-mail it in to [service@staps.com](mailto:service@staps.com) or to your marketer.

# INDEXALYZER™ Report Request Form

## Top 25 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

# 2 Year Allocation Strategy Supplemental Report

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

\*You will need to log into your subscription on [www.indexalyzer.com/pfg](http://www.indexalyzer.com/pfg) and print the carrier report for the product you want illustrated.

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

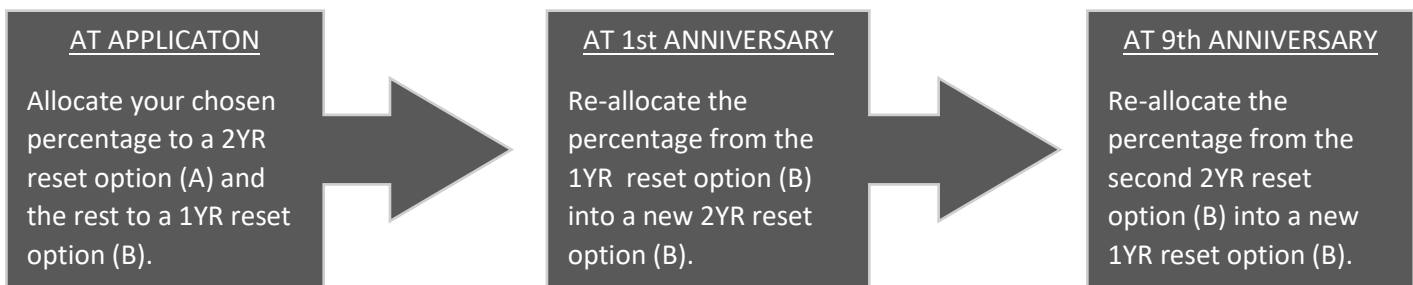
PREMIUM: \$ \_\_\_\_\_ SPLITS TO SHOW: (Circle) 50/50 60/40 70/30 80/20 90/10

*This report will help you generate an actual strategy for allocating your client's Fixed Indexed Annuity. Remember you are only to advise your client's on allocation decisions. It is the client's responsibility to make the final decisions concerning the allocations of any products.*

## Strategy Explanation:

*The basic idea behind this strategy is to divide your client's premium between a 2yr and 1yr reset strategy at application. Then upon the first anniversary move the 1yr reset amount into a new 2yr reset method. The goal is to have two portions of their money in 2yr reset options that will credit interest each year (providing that the index is positive). This is a great strategy for older clients with qualified dollars. If your client will reach 70<sup>1/2</sup> at some point during the surrender term of the annuity and plan on taking their Required Minimum Distributions (RMD's) from this annuity, they have a better chance of avoiding taking a withdrawal in a year where there is no interest credited. If they allocate all of their premium to one 2yr option, they will be taking RMD's in years with \$0.00 credited thus slowing down the compounding effect in the growth of their annuity.*

*Below is a flow chart of how this strategy works. This strategy will set you apart from your competition and demonstrate to your client's that you are actively managing their Fixed Indexed Annuity. DON'T BE SATISFIED WITH OFFERING ONLY SAFETY! Let's focus on how we can help your clients make as much as possible from their annuities!*



# INDEXALYZER™ Report Request Form

## Carrier Comparison Reports

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

Carrier #1	
Carrier #2	
Carrier #3	
Carrier #4	
Carrier #5	
Carrier #6	
Carrier #7	

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

Notes:

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# 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:

# INDEXALYZER™ Report Request Form

## Crediting Method vs. Stock Market Report

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

In this report we are going to compare the crediting method(s) from the product(s) that you request with the major stock market indices you choose. Complete the following questionnaire and either fax or e-mail it in.

CARRIER:	PRODUCT:
<input type="radio"/> Select the top performing option	
<input type="radio"/> Use the following option description	

CARRIER:	PRODUCT:
<input type="radio"/> Select the top performing option	
<input type="radio"/> Use the following option description	

CARRIER:	PRODUCT:
<input type="radio"/> Select the top performing option	
<input type="radio"/> Use the following option description	

Select the Index/Indexe you want to compare to.

<input type="radio"/> S&P 500	<input type="radio"/> DJIA	<input type="radio"/> NASDAQ	<input type="radio"/> S&P 400	<input type="radio"/> RUSSELL 2K
OTHER:				

# INDEXALYZER™ Report Request Form

## IUL Allocation Report

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

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

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

<b>CREDITING METHOD #1:</b>		<b>CREDITING METHOD #2</b>	
INDEX		INDEX	
PAR		PAR	
CAP		CAP	
SPREAD		SPREAD	
TRIGGER		TRIGGER	
FEE		FEE	
<b>CREDITING METHOD #3</b>		<b>CREDITING METHOD #4</b>	
INDEX		INDEX	
PAR		PAR	
CAP		CAP	
SPREAD		SPREAD	
TRIGGER		TRIGGER	
FEE		FEE	
<b>CREDITING METHOD #5</b>		<b>CREDITING METHOD #6</b>	
INDEX		INDEX	
PAR		PAR	
CAP		CAP	
SPREAD		SPREAD	
TRIGGER		TRIGGER	
FEE		FEE	
<b>CREDITING METHOD #7</b>		<b>CREDITING METHOD #8</b>	
INDEX		INDEX	
PAR		PAR	
CAP		CAP	
SPREAD		SPREAD	
TRIGGER		TRIGGER	
FEE		FEE	

# 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
<b>1</b>						
<b>2</b>						
<b>3</b>						
<b>4</b>						
<b>5</b>						
<b>6</b>						
<b>7</b>						
<b>8</b>						
<b>9</b>						
<b>10</b>						
<b>11</b>						
<b>12</b>						
<b>13</b>						
<b>14</b>						
<b>15</b>						
<b>16</b>						

Carriers and product's you want to compare to.

CARRIER	PRODUCT	CARRIER	PRODUCT



# INDEXALYZER™ Report Request Form

## 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:

# INDEXALYZER™ Report Request Form

## Index Family Report

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

With this report you can find the best products that utilize the same indices. Select the index you want represented the report.

- 10 Year Treasury
- Bloomberg
- dbIQ CROCI
- Franklin US
- Hang Seng
- Janus
- Merrill Lynch
- MSCI
- NYSE Zebra
- S&P 400
- SPDR Gold
- Annuity Linked TVI
- BNP Paribas
- Dow Jones
- Goldman Sachs
- iShares
- JP Morgan
- Morgan Stanley
- NASDAQ
- PIMCO
- S&P 500
- SG Columbia Threadneedle
- Barclays
- Citi
- EuroStoxx 50
- Guggenheim
- Jackson National
- London Gold
- Morningstar
- Nikkei
- Russell 2000
- S&P 500 Risk Control

Notes: