

UNITED OF OMAHA LIFE INSURANCE COMPANY

A MUTUAL of OMAHA COMPANY

Annuity Suitability Information and Buyer's Guide Certification

We appreciate your interest in purchasing an annuity from United of Omaha Life Insurance Company. United of Omaha and your licensed producer are required to ask you for information to help you determine if this product is suitable for you, in light of your investment goals and your current and anticipated future financial situation. Prior to purchasing an annuity it is important for you to have thought through your financial condition – now and what you expect in the future – as well as the goals you are pursuing in purchasing an annuity.

Product Name _____

Contract Owner/Annuitant Name(s): _____
Phone Number: _____ Age Last Birthday: _____
Marital Status: Married Single Widowed Divorced
Occupation: _____

Financial Information Annual Household Income \$ _____
Estimated Net Worth (excluding primary residence, automobile(s) and furnishings)
\$ _____

Do you have sufficient sources of cash, other income, or liquid assets, other than the amount paid for this annuity, available for living expenses and emergencies?
 Yes No

Federal Tax Bracket %
 0 to 10% Greater than 10%

Source of Income (Check all that apply)
 Employment Retirement Plans
 Investments/Savings Social Security
 Other _____

Insurance Product or Investment Experience (Check all that apply)
 Stocks Certificate of Deposit
 Bonds Fixed Annuities
 Mutual Funds Variable Annuities
 Life Insurance Variable Life Insurance

Source of Premium (Check all that apply)
 Stocks Checking/Savings Account
 Bonds Certificate of Deposit
 Mutual Funds Fixed Annuities *
 Reverse Mortgage Variable Annuities *
 Other _____ Life Insurance *

* Is this a replacement of another annuity or life contract?

Yes No

If yes, what is the surrender charge(s) %, if any? _____%

