ANNUITY IDENTIFICATION REVIEW

1. Why is it important to identify the type of retirement plan you are evaluating?

2. Which health care asset policy do you apply to a defined benefit pension plan?

3. In what two forms does an Individual Retirement Arrangement (IRA) come and which health care asset policy do you apply to each?

   - _____

   - _____

4. What are three ways to determine if a retirement plan is an annuity?

   - _____

   - _____

   - _____

5. How do you evaluate a charitable gift annuity?