

PPGA Fact Finder

Personal Information

- 1. Name: _____
- 2. Name of Agency: _____
- 3. Business Address: _____
 City: _____ State: _____ Zip Code: _____
 Business Phone: _____ Cell Phone: _____
 Email: _____
- 4. Will you be recruiting agents? Yes No
- 5. Number of current agents: _____
- 6. Are you Securities Licensed? Yes No
- 7. If Yes, Name and address of Broker/Dealer
 Broker/Dealer: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____
 Business Phone: _____ Contact: _____
 If Yes, does your Broker/Dealer control your Indexed Annuity sales? Yes No
- 8. What companies do you currently sell for _____
- 9. What are your Target Markets? _____
- 10. What states do you currently do business in? _____
- 11. If you are marketing 403(b)/457, what school districts do you currently sell in?

Production commitment

What is your production goal for LSW:

	SPDA	Annualized Flow Premium (Salary Reduction/Bank Draft)	Target Life Premium
Within 90 Days			
Within 12 Months			

Signature: _____
 Date: _____
 Recruited by: _____

LSW...Integrity You Can Retire On!



Life Insurance Company of the Southwest