

# Factfinder for Pension Maximization Strategy Using Life Insurance

**Plan Participant's Name:** \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Smoker Status:    Smoker         NonSmoker

Health Status:    Excellent         Average         Poor

Planned Retirement Age: \_\_\_\_\_

Projected Income Tax Bracket at Retirement: \_\_\_\_\_

Name of Employer: \_\_\_\_\_

Retirement Plan Payout Options:

Life Only Monthly Annuity Amount: \_\_\_\_\_

Joint and Survivor Monthly Annuity Amount: \_\_\_\_\_

Survivor Benefit Percentage: \_\_\_\_\_ %

**Participant's Spouse's Name:** \_\_\_\_\_

Date of Birth: \_\_\_\_\_

## Other Information:

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The Pension Maximization concept works most effectively for married individuals who are currently participants in a defined benefit pension plan, are 10-15 years away from retirement and who are comfortable allocating some of their retirement income to pay premiums on life insurance.

Life insurance products are issued by ReliaStar Life Insurance Company (Minneapolis, MN), ReliaStar Life Insurance Company of New York (Woodbury, NY) and Security Life of Denver Insurance Company (Denver, CO). Only ReliaStar Life Insurance Company of New York is admitted, and its products issued, within the state of New York. All are members of the ING family of companies.

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