



Allianz Annuity Suitability Form

■ Liquid Assets

9. Approximate household liquid assets

\$ _____

- ♦ Examples: checking, savings or money market accounts, short-term CDs, bonds, annuities without surrender charges, etc.
- ♦ Exclude assets used to fund this annuity, free withdrawals from this annuity, and personal belongings

Liquid

Non Liquid

Stocks
Bonds
Mutual Funds
Short Term CD
Surrender Free Annuities
Annuity Free Withdrawals
Life Insurance Cash Value
Checking/Savings
401k (over 59 ½ yrs old)

Long Term CD
Property
Collectibles
Home Equity Loans
Lines of Credit
Reverse Mortgage Funds