

“Growing Your Money Safely with Annuities”

214-542-2084



Consultation Request

After filling out this form completely, you may

- Fax it to SMA at: 815-572-9227 *or*
- Mail it to: Safe Money Assets, PO Box 497138, Garland, TX 75049-7138

I am interested in finding out more about annuities and increasing my “safe money assets!” Please contact me to schedule my no-obligation, 30-minute appointment.

General Information

First Name: _____ Last Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Telephone: (H) _____ (W) _____

Best Time: 9 AM- Noon 1 PM – 5 PM 6 PM – 8 PM

Best Place: Home Work

I am interested in:

- CD alternative. My CD comes due on _____
- IRA or IRA Rollover
- Roth IRA
- Additional Long-term savings using an annuity
- Life Insurance / Disability Income / Long Term Care

Personal Information

Male Female

Date of Birth: _____

Anticipated savings amount: \$ _____

***Signature:** _____

* Your signature is required for **No Call List** compliance.