



Featured Fixed Index Annuities (FIAs)

(800) 732.1489

Rates valid as of 07.07.20 and are subject to change without notice.



PM Financial Group

Company AM Best Rating	Product	Minimum Premium	Features	Interest Rates		Issue Ages	Minimum Guarantee	Withdrawal Options	Commission
Reliance Standard A+	Keystone 5 (5 yr. contract) Not Approved In: AL, MT, NY	\$10,000	Penalty-free access available; Rollover/transfer funds from IRAs or qualified pension/profit sharing plans; Reallocation; nursing care & terminal illness/condition benefits	2.40% fixed 4.00% pt-to-pt CAP 25% Participation Rate 4.50% mo. Avg CAP		0-85 Q & NQ	1.00% on 100.00%	Withdraw up to 10% of prem paid in 1st yr; after 1st yr, up to 10% of the annuity val ea year with no surrender charges.	Please contact your back office
Great American A	American Landmark 5 MVA version (5 yr. contract) (not avail in AK, CA, PA, UT, VA)	\$10,000	Subsequent purchase payments accepted in first two contract months; Extended Care & Terminal Illness Waiver; Penalty-free w/d during first contract year; After first contract anniversary, 10% of account value as of the most recent contract anniversary	NonMVA rates in (<\$100k Band) 1.40% (1.20%) fixed 40% (35%) Risk Control 45% (40%) US Retiree 3.80% (3.15%) US Real Estate 3.80% (3.50%) S&P 500 APtP	NonMVA rates in (>\$100k Band) 1.50% (1.25%) fixed 45% (40%) Risk Control 50% (45%) US Retiree 4.05% (3.65%) US Real Estate 4.05% (3.70%) S&P 500 APtP	18-89 Q 0-89 NQ	1.25% on 87.5%	Year 1: withdraw up to 10%; after year 1, 10% of acct value can be withdrawn	Please contact your back office
The Standard A	ISA 5 (5 yr. contract)	\$15,000	Single-premium deferred indexed annuity with a 5-yr. withdrawal charge period.	\$15K Fixed Rate: 2.00% S&P 500 APtP: 4.00% Par Rate: 28%	\$100K Fixed Rate: 2.00% S&P 500 APtP: 4.25% Par Rate: 30%	0-93	87.5% of premium at 1.00%	Please contact your back office	Please contact your back office
Great American A	American Legend 7 MVA version (7 yr. contract) N/A in PA, VA	\$10,000	Offers multiple indexed strategies; accepts multiple purchase payments; Inheritance Enhancer & IncomeSecure riders available; Extended Care & Terminal Illness waivers included	NonMVA rates in (<\$100k Band) 1.45% (1.25%) fixed 45% (40%) Risk Control 3.90% (3.55%) S&P 500 APtP 3.95% (3.20%) US Real Estate 4.40% (3.90%) GLD APtP 45% (40%) US Retiree	NonMVA rates in (>\$100k Band) 1.55% (1.35%) fixed 50% (45%) Risk Control 4.15% (3.80%) S&P 500 APtP 4.45% (3.70%) US Real Estate 4.65% (4.15%) GLD APtP 50% (45%) US Retiree	0-85 Q & NQ	1.25% on 87.5%	Year 1: withdraw up to 10%; after year 1, 10% of acct value can be withdrawn	Please contact your back office
Reliance Standard A+	Keystone 7 (7 yr. contract) Not Approved In: AL, MT, NY	\$10,000	Penalty-free access available; Rollover/transfer funds from IRAs or qualified pension /profit sharing plans; nursing care and terminal illness/condition benefits	4.35% ann pt-to-pt CAP 27% Participation Rate 4.85% mo. Avg CAP 2.40% fixed		0-85 Q & NQ	1.00% on 100.00%	Withdraw up to 10% of prem paid in 1st yr; after 1st yr, up to 10% of the annuity val ea year with no surrender charges.	Please contact your back office
Allianz Preferred* A+	Core Income 7[®] Annuity (7 yr.)	\$10,000	Includes a managed volatility index allocation on annual pt-to-pt with a spread and annual pt-to-pt with a cap crediting methods, additional cost income rider automatically include.	2.50% Fixed Interest 4.50% ann. PtTpt cap Nasdaq-100, S&P 500, Russell 2000 6.50% ann. PtTpt cap Bloomberg US Dynamic Bal Index II 1.75% ann PtTpt spread Bloomberg US Dynamic Bal Index II 100% ann PtTpt par rate Bloomberg US Dynamic Balance II ER Index 130% 2-yr PtTpt par rate Bloomberg US Dynamic Balance II ER Index		0-80	87.5% of total premium paid	After 1st contract year and prior to taking income, up to 10% of contract's premium paid can be withdrawn each contract year w/o surrender charge & MVA	Please contact your back office
Allianz Preferred* A+	Allianz 222 Annuity (10 yr. surrender charge period, C54370-MVA & R95352-MVA)	\$20,000 Q and NQ	10% Premium bonus on all premiums during first contract year, applied to Protected Income Value not Accumulation Value. Interest bonus equal to 50% of any interest earned from chosen allocations credited to the PIV.	FIXED: 1.30% (min. fixed interest 0.10%); MO. SUM CAP: 1.50% Nasdaq-100, Russell 2000, 1.20% S&P 500 (minimum cap 0.50%); ANN. PT.-TO-PT. CAP: 2.25% S&P 500, Nasdaq 100, 2.50% Russell 2000, Bloomberg US Dynamic Balance Index II, 2.15% BlackRock iBLD Claria; ANN. PT.-TO-PT. SPREAD: 4.10% Bloomberg US Dynamic Balance Index II & PIMCO Tactical Balanced, 3.85% BlackRock iBLD Claria; (min. cap 0.25%); ANN. PT.-TO-PT. PARTICIPATION RATE: 55% BlackRock iBLD Claria, 50% Bloomberg US Dynamic Balance II ER & PIMCO Tactical Balanced ER		0-80	87.5% of total premium paid	After 1st contract year and prior to taking income, up to 10% of contract's premium paid can be withdrawn each contract year w/o surrender charge & MVA	Please contact your back office
Allianz Preferred* A+	Allianz 360 Annuity (10 yr. surrender charge period C54370-MVA & R95316-01 MVA)	\$20,000 Q and NQ	Interest bonus equal to 25% of any interest credited until lifetime withdrawals begin; Annual Rider charge 1.20% of the accumulation value deducted monthly from the accum value and GMV (in most states).	FIXED: 2.10% fixed (min. fixed interest 0.10%); MO. SUM CAP: 2.00% Nasdaq-100, 1.80% S&P 500, 2.10% Russell 2000; ANN. PT.-TO-PT. CAP: 3.75% S&P 500, Russell 2000, & Nasdaq 100, 4.50% BlackRock iBLD Claria, 4.85% Bloomberg US Dynamic Balance Index II, 4.65% PIMCO Tactical Balanced; ANN. PT.-TO-PT. SPREAD: 1.45% BlackRock iBLD Claria, 1.85% Bloomberg US Dynamic Balance Index II, PIMCO Tactical Balanced; ANN. PT.-TO-PT. PARTICIPATION RATE: 85% BlackRock iBLD Claria ER, 80% Bloomberg US Dynamic Balance II ER & PIMCO Tactical Balanced ER		0-80	87.5% of total premium paid	After 1st contract year and prior to taking income, up to 10% of contract's premium paid can be withdrawn each contract year w/o surrender charge & MVA	Please contact your back office

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