



## SPIA Quote Request Template

Completed illustration/quote request forms can be submitted to iTrust Advisors via email ([itrustadvisors@itrustllc.com](mailto:itrustadvisors@itrustllc.com)) or fax (877-326-2477), or feel free to call us and discuss at 315-373-0500.

<b>Agent Name:</b>			
<b>Client Name:</b>			
<b>Date of Birth / Age:</b>			
<b>State of Sale:</b>			
<b>Joint Life or Single Life</b>			
<b>Solve for Income or Solve for Deposit?</b>			
<b>Qualified or Non-Qualified Funds?</b>			
<b>Income Payout Options:</b>	Life Only		
	Life with Period Certain (10 yr, 15 yr, etc)		
	Period Certain Only		
	Joint Life with X% to Survivor		
<b>Income Payout Frequency?</b> <i>(Typically Annual)</i>			
<b>Income Start Date</b> <i>(within 1 year)</i>			

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