

Urgent Rate Change!

In previous communications, I indicated that we identified an insurance company's deferred annuity that was offering about 20% more lifetime income than the next closest competitor without giving up control of one's principal.

As I suspected this was mispriced, and the insurance company has apparently identified that mistake and they have announced that they are correcting it for future contracts. They are slashing the guaranteed income rates to match other insurance companies.

For people in their late 50s and early 60s we are getting them 9 to 10% guaranteed lifetime income. Any application submitted before the end of the day on September 30 will get the old rates grandfathered in with the ability to add money to the contract for up to a year if you want to guarantee yourself a high level of income for the rest of your life.

If you do submit an app you are not obligated to fund it if you just want to keep your options open. Please contact our office immediately before these rates change if you want to lock in old rates.





We are committed to helping you achieve your financial goals. Please feel free to contact us with any questions, comments, or a more in-depth discussion.

Sincerely, Keith Singer

Singer Wealth 1515 S Federal Highway Suite 302 Boca Raton, FL 33432 (561) 998-9985 www.singerwealth.com

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Singer Wealth | 1515 S Federal Hwy Suite 302 | Boca Raton, FL 33432 US

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