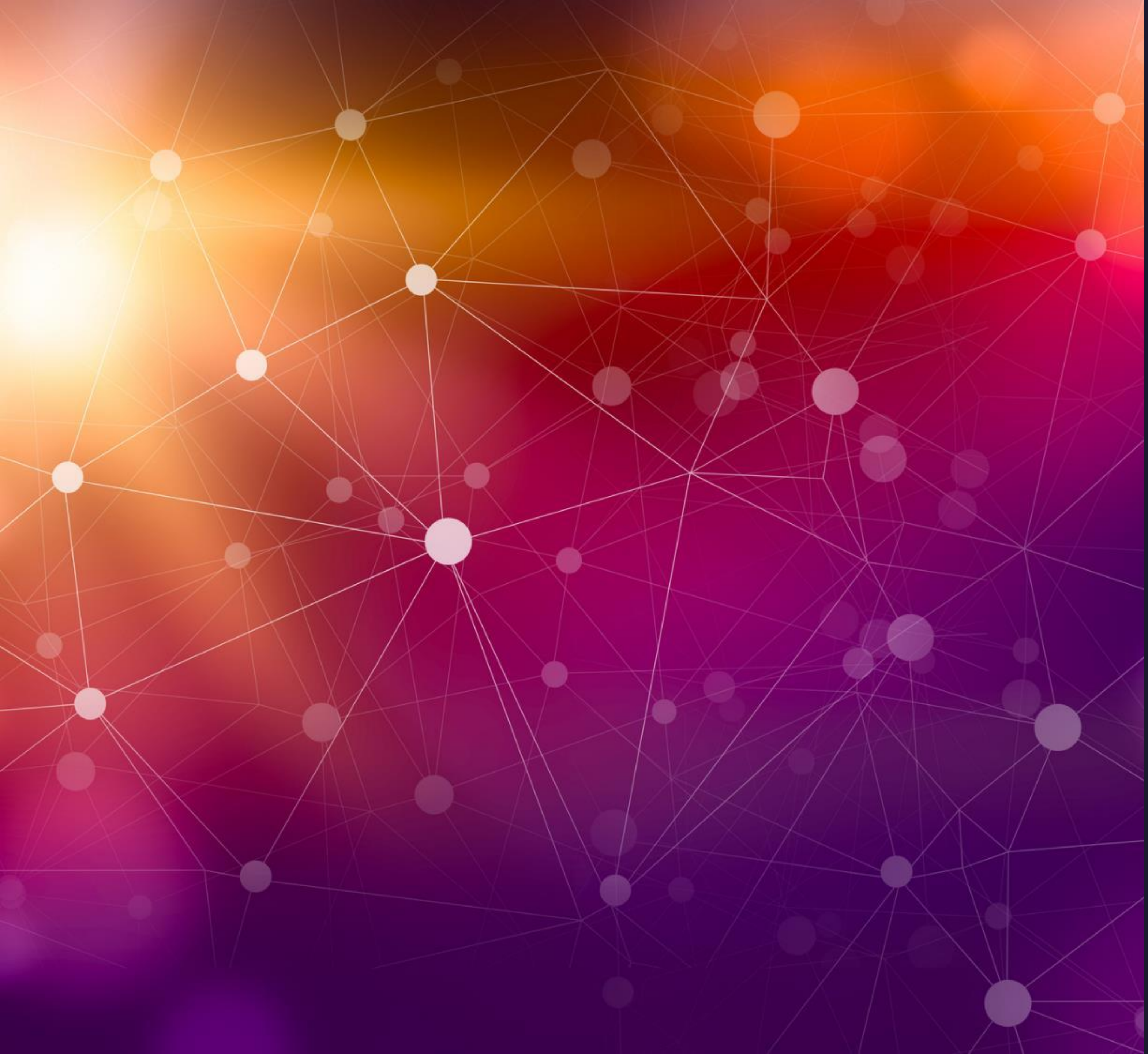


Fixed/Index Annuities: Connecting the Dots To Guarantee My Retirement

Steve Bass

President and Founder

Bass Financial Solutions

Agenda

Why Annuities?

Different Types of Annuities

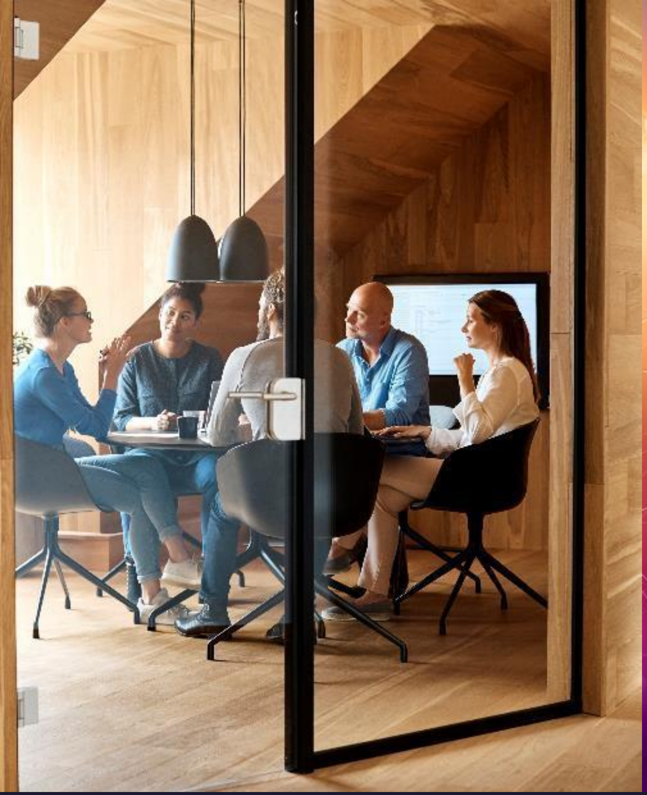
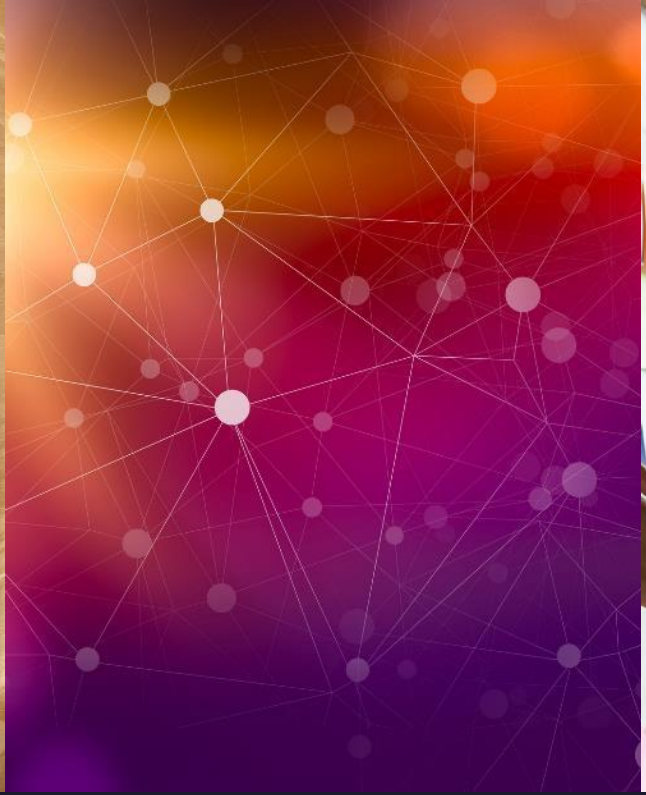
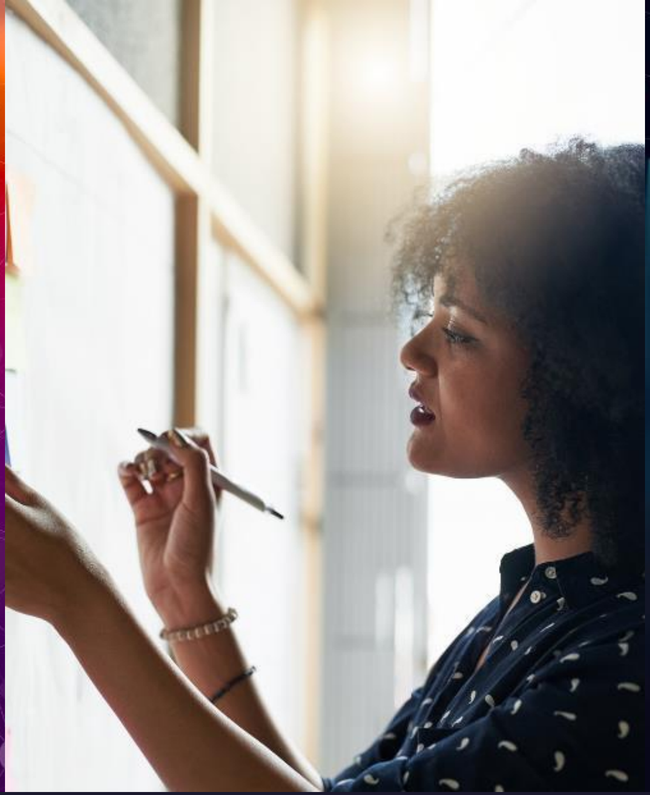
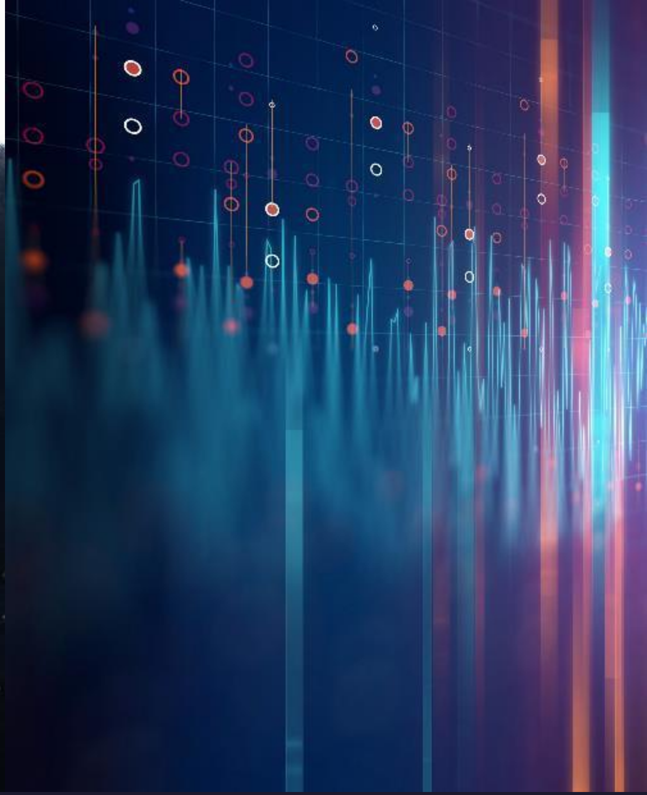
Bass Financial Solutions Annuity Client

What Are the Types of Transferable Assets?

When Do I Get Started?

Who Can Assist?

How Do I Get An Application Completed?

Why Annuities?

You have often heard it said, "Annuities create an estate you cannot outlive." That is not always true. There are two types of fixed/index annuities:

1) Income Annuities – these fit the statement. So let's discuss…

2) Legacy Annuities – these are for beneficiaries and not the annuitant(s)

Different Types of Annuities & Benefits

FIXED/INDEX ANNUITIES

Fixed/Index Annuities have 0% in fees or between 1-1.25% in annual fees where you invest in a Fixed Acct or a Market Index

- Upfront Bonus of 25%-45%
- Long-Term Care and Inflation Riders
- Here gains are locked in when the market goes down.
- Guaranteed Lifetime Withdrawal Income

VARIABLE ANNUITIES

These annuities are tied to “subaccounts” that are mutual funds and the stock market.

The fees are usually 3%-3.5% a year

You have an unlimited ceiling of earnings but also an unlimited floor of losses

Can provide a 6%-7% guaranteed lifetime income rider rate

Bass Financial Solutions Annuity Client

.* 40+ years of age or older

- Previous retirement account from a previous job
- Wealthy Client
- Current retirement plan offers a “Non-Hardship” Withdrawal to move dollars before you retire

What are the Types of Transferable Assets?

THE ONES YOU ALREADY KNOW

- 401(k) or 403 (b)
- IRA or ROTH IRA
- CDs or Savings or Cash
- 457 (b)

THE ONES YOU MAY NOT KNOW

- Inheritance
- Court Settlements

The way to get started is to quit talking and begin doing.

Walt Disney

When Do I Get Started? Well…NOW! Here is the Timeline:

Start — To get started, we need to have a phone call or Zoom Mtg to see if an annuity is right for you.

Confidence — Next, you need to understand your annuity to the point that it is as natural to you as talking about your favorite subject.

Call Reid — As we connect, I will call Reid to look at all the annuity options nationally available to fit the right fit for you & your family.

Decision Time — This is the time I will unveil my “professional recommendation” with sales material and illustrations based on your stated objectives.

Online App — Now we get an online application completed to make sure that it is approved by the annuity company’s Suitability Dept.

Who can Assist?

Let me introduce you to:

Reid Juul –

Principal at Simplicity Houston and the 3rd Party who can help me with the sale and the application to make sure it is suitable for you. Mr. Juul has over 20 years of combined sales and marketing experience in the financial services industry. He earned a B.S. in Business Administration from the University of Kansas in Lawrence. Mr. Juul is a Registered Securities Principal, holding his FINRA Series 24, 7, 66, 63 licenses, and a Group 1 Life License.

How Do I Get an Application Completed?

Here is where I hand off to Erin Parker, Executive Assistant, on the steps to seamlessly get an online e-app completed to send to the annuity company for Suitability.

Thank you for joining in on this presentation.

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