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| **Grantor Retained Annuity Trust**  Request for proposal |

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| --- | --- | --- | --- |
| Date: |  |  |  |

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| --- | --- |
| Principal® agency/BGA partner office name and number\*: |  |
| \*Proposals will not be provided without an indication of a valid Principal agency or BGA partner relationship. | |

**Financial professional & proposal delivery information**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Name and designations: | | | |  | | |
| Email: |  | | | | Phone: |  |
| Name and designations: | | | |  | | |
| Email: |  | | | | Phone: |  |
| **Principal wholesaler:** | | |  | | | |
| Should anyone else (Financial professional or BGA) receive this proposal? If so, please provide: | | | | | | |
| Name: |  | | | | | |
| Email address: | |  | | | | |

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| **Please allow 5 business days from receipt of completed RFP.**  **Questions** can be sent to [newrfps@exchange.principal.com](mailto:newrfps@exchange.principal.com) or **call** 833-803-8345.  **Email** RFPto [newrfps@exchange.principal.com](mailto:newrfps@exchange.principal.com) or **fax** RFPto Case Design Team, 866-946-3209. |

**Client information**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Client name: | | |  | | | | | | | |
| Date of birth | |  | | | Gender: |  | Tobacco status: |  | Risk class: |  |
| Spouse name: | | | |  | | | | | | |
| Date of birth | |  | | | Gender: |  | Tobacco status: |  | Risk class: |  |
| Issue state: |  | | | | | | | | | |

**Product selection**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Product: |  | | Interest rate: |  | Net  Gross | | | |
| Face amount (Business and Advanced Solutions will solve for this, or you can provide): | | | | | | |  | |
| Premium (Business and Advanced Solutions will solve for this, or you can provide): | | | | | |  | | |
| Guaranteed until age (Business and Advanced Solutions will solve for this, or you can provide): | | | | | | | |  |
| Number of years to pay premiums: | |  | | | | | | |

**GRAT details**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Amount of intended gift (before any discounts): | | $ | |  | | | Minority interest & marketability discount rate: | | | % |
| Assumed growth rate: | % (default 6%) | | | | Assumed income rate: | | | % (default 2%) | | |
| Length of GRAT (in years): | |  | | | | | | | | |
| Do you want us to solve for a specific remainder interest? If yes, please indicate: | | | | | | | | |  | |
| Amount of lifetime gift tax exemptions to use: | | | Client | | | $ | | | | |
|  | | | Spouse | | | $ | | | | |

**Notes**

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