



# Settlement Partners, LLC

Investments • Structured Settlements • Consulting

## Quote Shopping Worksheet

Person Running Quotes \_\_\_\_\_

Annuitant \_\_\_\_\_

Date Quoting \_\_\_\_\_

DOB \_\_\_\_\_

Purchase Date \_\_\_\_\_

Premium Amount \_\_\_\_\_

1<sup>st</sup> Payment \_\_\_\_\_

Benefit Stream \_\_\_\_\_

Life Company	Rating	R. Age	Book Rate	Daily
MetLife	A+15			
Mutual of Omaha	A+15	XXX XXX		
NY Life	A++15			
PL&A	A+15			
Prudential	A+15			
USAA	A++15			

Am General	A 15			
Independent Life	EJ A			



Summit Settlement  
Services