

# Take A Look At Your Improved Annuity Statement!

Your annuity plays an important part in reaching your long-term financial goals. With our new statements, it's easier than ever to find account information to ensure your plans stay on track.

Please note this guide is a general overview of the information that may be available on your fixed-indexed annuity statement. It's not an actual representation of your statement.



**GREAT AMERICAN**  
INSURANCE GROUP  
Annuities

## Your Annuity Statement

Statement Period: 02/20/2018 – 02/20/2019

Name  
Address  
City, State ZIP

**1.** **Contract Number:** xxxxxxxx

**Owner(s):** Name

**Annuitant(s):** Name

**Effective Date:** 02/10/2011

**Tax Qualification:** IRA

**Annuity Product:** Product name

**2.** **Financial Professional:** Name  
Phone  
Email

<Agency> Company name  
Company address

**3.** Product issued by Company Name  
Phone  
GAIAnnuities.com

<b>4.</b> Account Summary for Statement Period	Since Contract Inception	<b>6.</b> Strategy Allocation as of 02/20/2019
Account Value as of 02/20/2018 \$86,000.00	Purchase Payments \$80,000.00	 <ul style="list-style-type: none"> <li><span style="color: #00a0c0;">■</span> Strategy name 1%</li> <li><span style="color: #0070c0;">■</span> Strategy name 52%</li> <li><span style="color: #004080;">■</span> Strategy name 47%</li> </ul>
Interest \$4,265.00	Withdrawals - \$12,000.00	
Withdrawals - \$4,000.00		
Account Value as of 02/20/19 \$86,265.00		
Surrender Value as of 02/20/2018 \$86,000.00		
Surrender Value as of 02/20/2019 \$86,265.00		

**7.** **Performance Summary for Statement Period**

	Cap	Participation Rate	Index Change	Your Credited Interest Rate*
Strategy name	N/A	N/A	N/A	1.00%
Strategy name	4.50%	N/A	5.00%	4.50%
Strategy name	N/A	50.00%	12.00%	6.00%

\*Your Credited Interest Rate is for amounts held for the entire statement period and does not take withdrawals into account.

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**1.** **Basics** – Find basic information such as your contract number, product name and tax qualification.

**2.** **Financial Professional** – If you need to reach your financial professional, check here for the most up-to-date contact information.

**3.** **Company Information** – Our customer service representatives are always happy to help! You can also log into our secured website to update your address, access forms, view your latest account activity and more.

**4.** **Account Summary for Statement Period** – Provides a glimpse of account activity, along with beginning and ending account value and surrender value. Surrender values reflect factors such as early withdrawal charges and any outstanding loan balances.

**5.** **Since Contract Inception** – Offers a look at account activity since the contract went into effect.

**6.** **Strategy Allocations** – Provides a visual representation of how your money is allocated among available interest strategies.

**7.** **Performance Summary for Statement Period** – Quickly find the amount of interest credited for each of your strategies. Note this section only appears if your contract was purchased with a single purchase payment.

8.	<b>Strategy Summary for Statement Period</b>							
	Strategy	Beginning Account Value	+	Interest	-	Withdrawals	=	Ending Account Value
	Strategy name	\$5,000.00		\$50.00		\$4,000.00		\$1,050.00
	Strategy name	\$43,000.00		\$1,935.00		\$0.00		\$44,935.00
	Strategy name	\$38,000.00		\$2,280.00		\$0.00		\$40,280.00
		\$86,000.00						\$86,265.00
9.	<b>Index Summary for Statement Period</b>							
				Term Start Index Value		Term End Index Value		Index Change
	Index name			2700.00		2835.00		5.00%
	Index name			2200.00		2464.00		12.00%
10.	<b>Transaction Summary for Statement Period</b>							
	Date	Transaction Type			Amount			
	12/20/2018	Withdrawal			\$4,000.00			
	<small>For additional transactions associated with your contract, please log into your account at GAIGannuities.com.</small>							
11.	<b>Strategy Summary for Terms in Progress</b>							
	Strategy	Term Start Index Value	Cap	Participation Rate	Declared rate	Account Value		
	<b>Terms in Progress 02/20/2019 – 02/20/2020</b>							
	Strategy name	N/A	N/A	N/A	1.00%	\$1,050.00		
	Strategy name	2835.00	4.75%	N/A	N/A	\$44,935.00		
	Strategy name	2464.00	N/A	55%	N/A	\$40,280.00		
12.	Additional Information							

- 8. **Strategy Summary for Statement Period** – Summarizes account activity that occurred within each of your strategies.

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- 9. **Index Summary for Statement Period** – Shows the index values that were used to calculate your credited interest rate. This section only appears if your contract was purchased with a single purchase payment. Otherwise, you will see a section called Strategy Summary for Completed Terms that summarizes account activity, broken down by individual purchase payments, for each of your completed terms.

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- 10. **Transaction Summary** – You’ll see this section if there are any transactions to report such as withdrawals, purchase payments and loan payments.

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- 11. **Strategy Summary for Terms in Progress** – Details your current strategy allocations and values that will be used to determine your credited interest rate at the end of the term.

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- 12. **Additional Information** - Includes important reminders and company updates.

We do our best to make things simple.  
 If you have questions, give us a call. We’re here to help!



Uncomplicate Retirement®

Not FDIC or NCUSIF Insured	No Bank or Credit Union Guarantee	May Lose Value	Not Insured by any Federal Government Agency	Not a Deposit
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