

Annuity Selection Made Easy

With the RightBRIDGE Annuity Wizard



50+ Annuity carriers in U.S. market

2,500+ Annuity products in marketplace

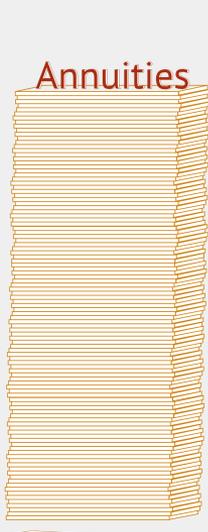


+1,000's of options and riders

deferred indexed step-ups
variable annuity fixed
equity exposure payments lifetime
rider fee portfolio restrictions
age needed
income benefit base
guaranteed withdrawal rate

deferral credit

lives covered



With thousands of annuities, how are financial professionals going to find the time to select the appropriate annuity for each client?



The RightBRIDGE Annuity Wizard analyzes and filters all available annuities based on the clients preferences and objectives.

Best Annuities



The engine configures and filters a company's inventory of available annuities and living benefit options. Then presents those that best meet the client's objectives



Annuities are then compared side-by-side to ensure that a financial professional is selecting the best possible annuity for their client.

The RightBRIDGE Annuity Wizard in 4 Easy Steps

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STEP ONE

The RightBRIDGE Annuity Wizard gathers a client's information including preferences and future desires.



STEP TWO



The engine determines the relevance of specific annuities in the company's inventory of available annuities based on the best fit for a client's needs.



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STEP THREE

A financial professional can select any of the annuities listed and is provided with detailed reason text™ on each annuity and rider option.



STEP FOUR



A financial professional can also select annuities to compare side-by-side.



After evaluating many different tools to help in the selection and presentation of annuities for our financial professionals we felt that RightBRIDGE technology and needs-based approach provided a comprehensive solution including giving our professionals specific reasons why particular annuities with riders meet a specific client need. We worked closely with CapitalROCK to configure the RightBRIDGE Annuity Wizard for all the annuity products we sell and look forward to our continued relationship with CapitalROCK.

- Scott Stolz, President of Raymond James Insurance

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