

Your **Company** Logo

Level vs Indexed Annuity Illustration

for

**Example Client**

Created by Your Name

Your Company

## Introduction

The following report contains a "Level versus Indexed Annuity" forecast. This takes the forecasted values of both your indexed and level annuities in order to illustrate how each option will affect your finances over the next 40 years. Indexed annuities are typically lower initially than their level counterparts, but can eventually become far more lucrative. This report will help illustrate the differences between taking a level and an indexed annuity, based on an "assumed" inflation rate, in order for you to decide which is the best option in your individual circumstances.

All figures displayed are in today's terms.

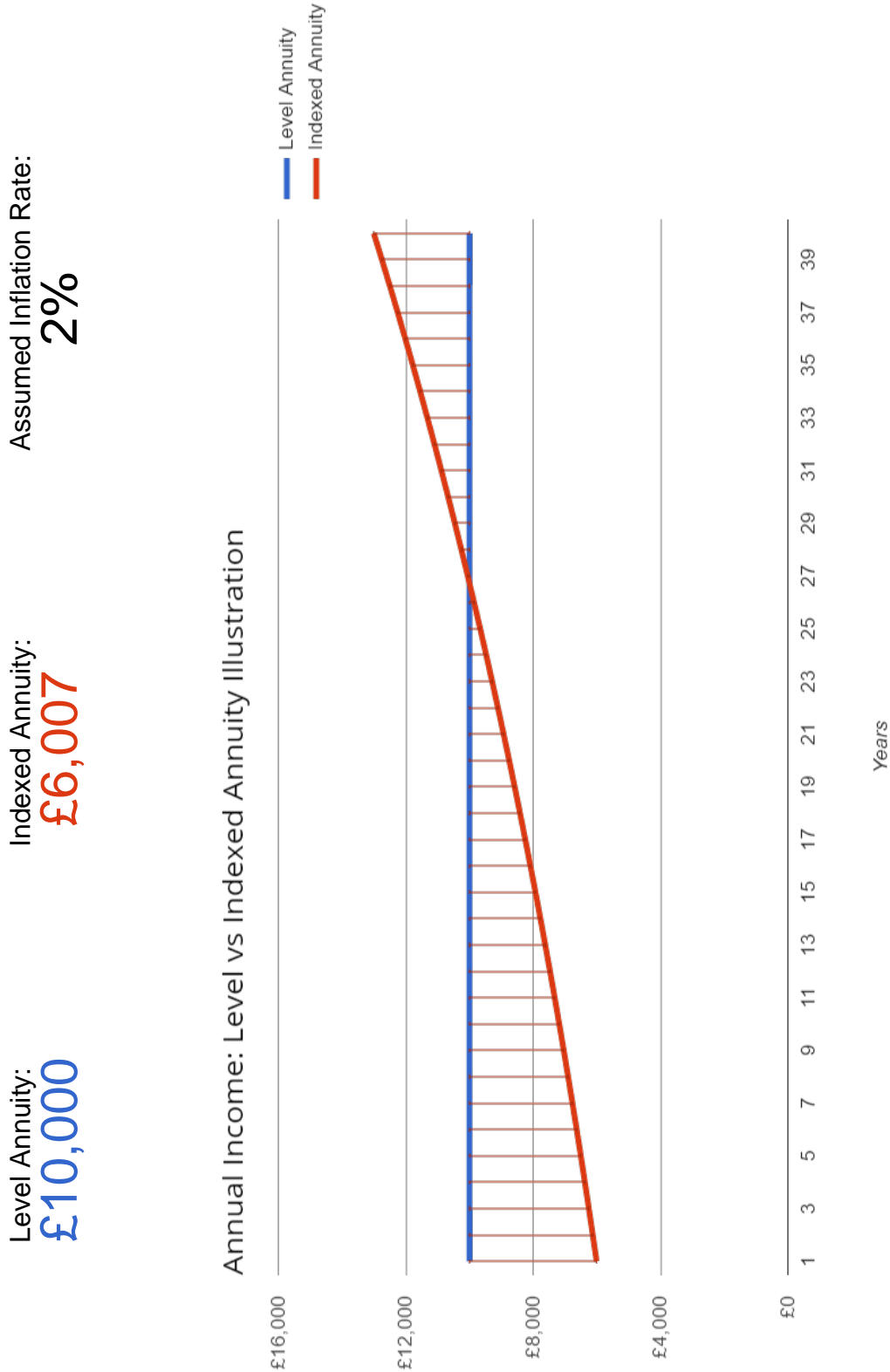
## Overview

Forecasts included:

**- £10,000 v £6,700k with 4% inflation**

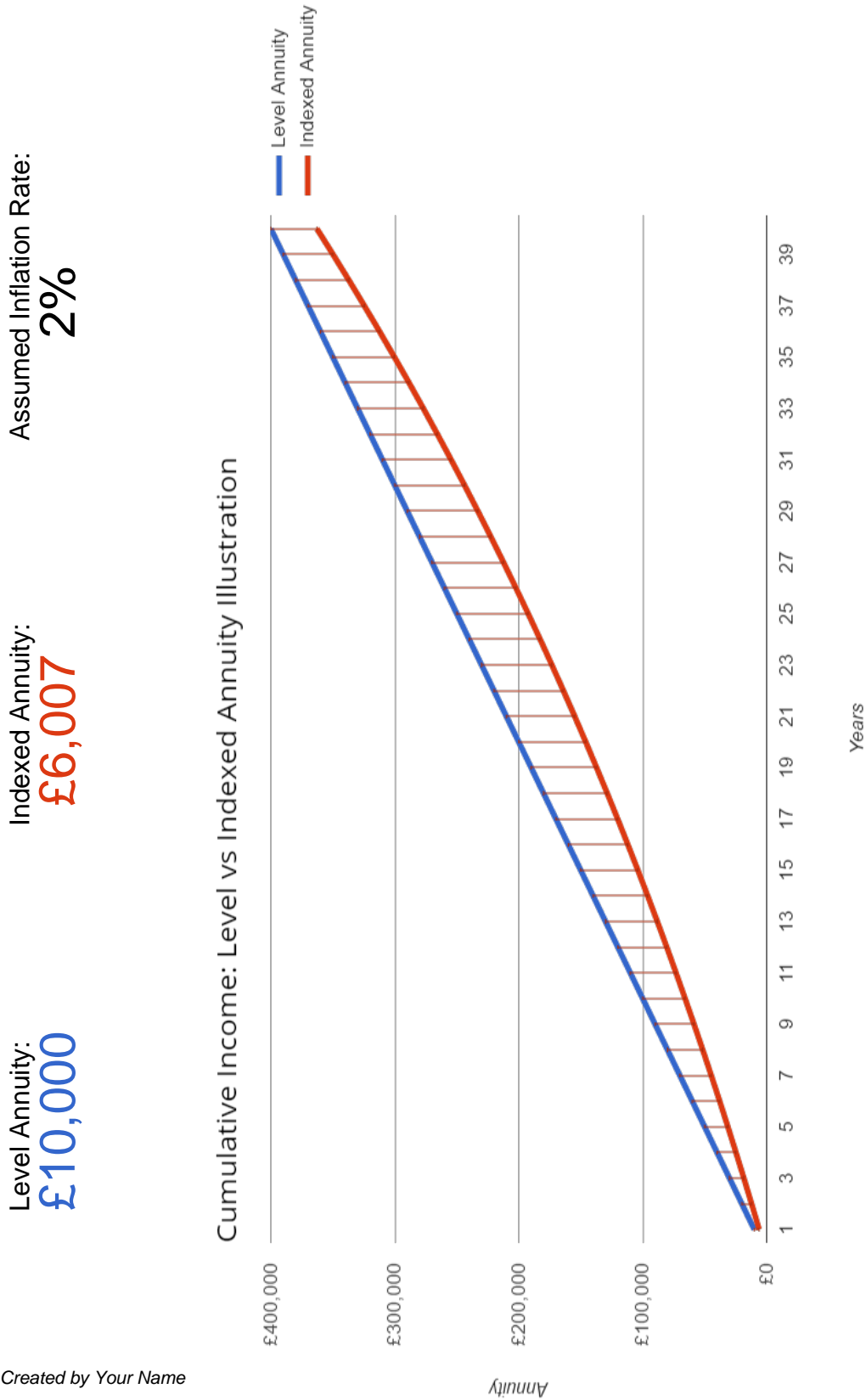


Forecast: £10,000 v £6,700k with 4% inflation





Forecast: £10,000 v £6,700k with 4% inflation



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Level Annuity:  
**£10,000**

Indexed Annuity:  
**£6,007**

Assumed Inflation Rate:  
**2%**

Year by year breakdown (£10,000 v £6,700k with 4% inflation)

Year	Age	Level Annuity	Indexed Annuity	Cumulative Level Annuity	Cumulative Indexed Annuity
1	55	£10,000	£6,007	£10,000	£6,007
2	56	£10,000	£6,127	£20,000	£12,134
3	57	£10,000	£6,250	£30,000	£18,384
4	58	£10,000	£6,375	£40,000	£24,758
5	59	£10,000	£6,502	£50,000	£31,261
6	60	£10,000	£6,632	£60,000	£37,893
7	61	£10,000	£6,765	£70,000	£44,658
8	62	£10,000	£6,900	£80,000	£51,558
9	63	£10,000	£7,038	£90,000	£58,596
10	64	£10,000	£7,179	£100,000	£65,775
11	65	£10,000	£7,322	£110,000	£73,097
12	66	£10,000	£7,469	£120,000	£80,566
13	67	£10,000	£7,618	£130,000	£88,185
14	68	£10,000	£7,771	£140,000	£95,955
15	69	£10,000	£7,926	£150,000	£103,882
16	70	£10,000	£8,085	£160,000	£111,966
17	71	£10,000	£8,246	£170,000	£120,213
18	72	£10,000	£8,411	£180,000	£128,624
19	73	£10,000	£8,579	£190,000	£137,203
20	74	£10,000	£8,751	£200,000	£145,954
21	75	£10,000	£8,926	£210,000	£154,880
22	76	£10,000	£9,105	£220,000	£163,985
23	77	£10,000	£9,287	£230,000	£173,272
24	78	£10,000	£9,472	£240,000	£182,744
25	79	£10,000	£9,662	£250,000	£192,406
26	80	£10,000	£9,855	£260,000	£202,261
27	81	£10,000	£10,052	£270,000	£212,313
28	82	£10,000	£10,253	£280,000	£222,567
29	83	£10,000	£10,458	£290,000	£233,025
30	84	£10,000	£10,667	£300,000	£243,692
31	85	£10,000	£10,881	£310,000	£254,573
32	86	£10,000	£11,098	£320,000	£265,672
33	87	£10,000	£11,320	£330,000	£276,992
34	88	£10,000	£11,547	£340,000	£288,539
35	89	£10,000	£11,778	£350,000	£300,317
36	90	£10,000	£12,013	£360,000	£312,330
37	91	£10,000	£12,254	£370,000	£324,584
38	92	£10,000	£12,499	£380,000	£337,082
39	93	£10,000	£12,749	£390,000	£349,831
40	94	£10,000	£13,004	£400,000	£362,835

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Level Annuity:  
**£10,000**

Indexed Annuity:  
**£6,007**

Assumed Inflation Rate:  
**2%**

Summary (£10,000 v £6,700k with 4% inflation):

Your £6,007 indexed annuity will take approximately 27 years to give a larger annual income than your £10,000 level annuity. This equates to more than 40 years before the total amount earned by your indexed annuity surpasses that of your level annuity (at an assumed inflation rate of 2%).