

Thank You For Your Annuity Application

While We Process Your Application, You May Receive a Call From EquiTrust

We may reach out to you personally to ensure that you are aware of some basic annuity features.

During the next several days while we process your application, you may receive a phone call from an EquiTrust representative. This is a business best-practice, and the call will take just a few minutes – this is not a sales call.

What to Expect

To protect your personal information, only your date of birth and last four digits of your Social Security number will be requested to confirm your identity. The purpose of the call is to confirm a variety of factors relating to your annuity purchase, including general product information and a review of the completed Financial Needs Analysis. (Note for Agent – assist your client by providing information in the blanks below.)

- Type of product purchased _____
- Length of surrender-charge period _____
- Liquidity provisions _____
- Source of funds used for the purchase _____

In Case We Miss You

If you're not available to take the phone call, the EquiTrust representative will leave a message and phone number requesting a call back during business hours, or may try to contact you again. To avoid any delays in processing your application, please answer the call or call back at your earliest convenience.

At the conclusion of the call, if you have any questions about your annuity purchase, we encourage you to contact your agent.

We look forward to the opportunity to serve you.
Thank you for choosing EquiTrust.



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