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CHAMBER ACTION

Senate

House

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Floor: 3/AD/2R
4/2/2008 3:13 PM

1 Senator Bennett moved the following **amendment**:

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3 **Senate Amendment**

4 Delete lines 312-332

5 and insert:

6 1. Personal information including the age and sex of the
7 parties to the annuity or life insurance, and the ages and number
8 of any dependents;

9 2. Tax status of the consumer;

10 3. Investment objectives of the consumer;

11 4. The source of the funds to be used to purchase the
12 annuity;

13 5. The applicant's annual income;

14 6. Intended use of the annuity or life insurance policy;

15 7. The applicant's existing assets, including investment
16 and life insurance holdings;

17 8. The applicant's liquid net worth and liquidity needs;



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9. The applicant's financial situation and needs;

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10. The applicant's risk tolerance; and