CLIENT SEGMENTATION WORKSHEET

Target Client

Age: _____

Life Stage: _____

When indicating your target clients' information, you may find the following life stages helpful:

Wealth Accumulators – Individuals preparing for retirement, typically age 45-54
Wealth Accelerators – Individuals transitioning into retirement, typically age 55-65
Wealth Preservers – Individuals in the retirement phase, typically over age 65

TOTAL INCOME

NAME	GENDER	AGE	LIFE STAGE	DB PENSION PLAN ($ INCOME)	TOTAL $ AUM						$ ASSETS INVESTED ELSEWHERE
					SWP*		GMWB		IMMEDIATE ANNUITY		
					$ Registered	$ Non-reg	$ Registered	$ Non-reg	$ Registered	$ Non-reg	

* The SWP product category represents regularly scheduled withdrawals from non-guaranteed sources of income such as mutual funds, segregated fund contracts, stocks, bonds, and bank or insurance company GIC's.

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