mpany	<u>Sta</u>	rt Date	Cost	Payout	Rate	Status
iva	202	24-04-01	\$29,624	\$34,539	4.50 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-04-01	\$397.00		hly payments	2031-06-01		None
acific Life	202	24-05-01	\$86,880	\$114,000	6.25 % Pre-order	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-05-01	\$1,000.00	114 monthly payments		2033-10-01		None
IG	202	24-06-01	\$204,917	\$499,432	6.13 %	In Stock (f)
Start Date	ate Income Amount No. of Payments/Frequency		ments/Frequency	End Date		COLA/Amount
2024-06-01	\$850.00	1 monthly payments		2024-06-01		None
2024-07-01	\$873.00	360 mon	thly payments	2054-06-01		3.00%
rudential Life	202	24-06-01	\$86,283	\$155,569	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-01	\$502.00	252 mon	thly payments	2045-05-01		2.00%
ISAA Life	202	24-06-01	\$522,539	\$872,423	5.98 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-01	\$3,712.00	235 mon	thly payments	2043-12-01		None
ndependent Life	202	24-06-01	\$163,379	\$240,715	5.75 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-01	\$1,337.00	180 mon	thly payments	2039-05-01		None
Berkshire Hathaway	202	24-06-03	\$330,066	\$517,000	5.64 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-03	\$1,000.00	153 mon	thly payments	2037-02-03		None
2027-03-03	\$64,000.00	· · · · · · · · · · · · · · · · · · ·	sum payment	2027-03-03		None
2032-03-03	\$100,000.00	1 lump s	sum payment	2032-03-03		None
2037-03-03	\$200,000.00	1 lump s	sum payment	2037-03-03		None
Berkshire Hathaway	202	24-06-06	\$145,832	\$276,219	5.94 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-06	\$500.00	28 mont	hly payments	2026-09-06		None
2026-10-06	\$870.00	228 mon	thly payments	2045-09-06		3.00%
alcott Resolution	202	24-06-10	\$77,269	\$145,000	6.00 %	In Stock (f)
Start Date	Income Amount		ments/Frequency	End Date		COLA/Amount
2024-06-10	\$500.00		thly payments	2038-02-10		None
2038-10-10	\$500.00	125 mon	thly payments	2049-02-10		None

ompany	Sta	rt Date	Cost	Payout	Rate	Status
incoln Financial	202	24-06-10	\$67,217	\$107,000	5.89 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-10	\$500.00	214 mon	thly payments	2042-03-10		None
Berkshire Hathaway	202	24-06-10	\$473,288	\$703,800 5.77 % In Stock (In Stock (f)
Start Date	Income Amount	No. of Pav	ments/Frequency	End Date		COLA/Amount
2024-06-10	\$3,825.00		thly payments	2039-09-10		None
MetLife	202	24-06-15	\$586,913	\$979,167	5.97 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-15	\$4,166.00	7 monthly payments		2024-12-15		None
2025-01-15	\$4,166.00	228 monthly payments		2043-12-15		None
MetLife	202	24-06-15	\$704,295	\$1,175,000	5.97 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency		End Date		COLA/Amount
2024-06-15	\$5,000.00	7 monthly payments		2024-12-15		None
2025-01-15	\$5,000.00	228 monthly payments		2043-12-15		None
Pacific Life	202	24-06-15	\$85,739	\$122,689	5.50 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-15	\$400.00	119 mon	thly payments	2034-04-15		None
2029-05-14	\$25,000.00	1 lump s	sum payment	2029-05-14		None
2034-05-14	\$50,000.00	1 lump s	sum payment	2034-05-14		None
MetLife	202	24-06-16	\$70,247	\$119,498	5.99 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-16	\$450.00	7 month	nly payments	2024-12-16		None
2025-01-16	\$493.00	236 mon	thly payments	2044-08-16		None
ohn Hancock	202	24-06-20	\$274,421	\$576,564	6.01 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-20	\$1,300.00	6 month	nly payments	2024-11-20		None
2024-12-20	\$1,300.00	300 mon	thly payments	2049-11-20		3.00%
AIG	202	24-06-26	\$61,867	\$92,000	5.77 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-26	\$500.00	184 mon	thly payments	2039-09-26		None
Talcott Resolution	202	24-06-28	\$277,641	\$659,110	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-06-28	\$1,100.00		hly payments	2031-12-28		None
2032-01-28	\$2,070.00	270 mon	thly payments	2054-06-28		None

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Company	Sta	rt Date	Cost	Payout	Rate	Status
ISAA Life	202	24-07-07	\$87,532	\$106,725	5.32 %	inreview (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-07-07	\$390.00	15 mont	hly payments	2025-09-07		None
2025-10-07	\$20,000.00	1 lump s	sum payment	2025-10-07		None
2025-10-07	\$750.00	60 monthly payments		2030-09-07		None
2030-10-07	\$35,875.00	1 lump s	sum payment	2030-10-07		None
letLife	202	24-08-19	\$228,278	\$378,150	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-08-19	\$31,000.00	5 annual payments		2028-08-19		None
2029-08-19	\$25,000.00	1 lu	ımp sum	2029-08-19		None
2034-08-19	\$30,000.00	1 lu	ımp sum	2034-08-19		None
2039-08-19	\$40,000.00	1 lu	ımp sum	2039-08-19		None
2044-08-19	\$50,000.00	1 lump sum		2044-08-19		None
2049-08-19	\$78,150.00	1 lump sum		2049-08-19		None
erkshire Hathaway	202	24-09-17	\$338,872	\$677,360	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-09-17	\$1,701.00	360 monthly payments		2054-08-17		None
2024-09-17	\$15,000.00	1 lump s	sum payment	2024-09-17		None
2027-09-17	\$50,000.00	1 lump s	sum payment	2027-09-17		None
acific Life	202	24-11-12	\$49,424	\$63,450	5.32 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-11-12	\$5,000.00	4 annu	al payments	2027-11-12		None
2030-11-12	\$43,450.00	1 lump s	sum payment	2030-11-12		None
llstate	202	24-12-10	\$105,737	\$144,966	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2024-12-10	\$851.00	144 mon	thly payments	2036-11-10		Annual Increase Each December
ew York Life	202	25-01-01	\$322,096	\$522,874	5.82 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-01-01	\$960.00	36 mont	hly payments	2027-12-01		None
2028-01-01	\$2,163.00	156 mon	thly payments	2040-12-01		None
2028-04-26	\$51,520.00	1 lump s	sum payment	2028-04-26		None
2033-04-26	\$51,520.00	1 lump s	sum payment	2033-04-26		None
2038-04-26	\$47,840.00	1 lump s	sum payment	2038-04-26		None
hn Hancock	202	25-01-15	\$70,286	\$155,446	6.01 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-01-15	\$300.00	116 mon	thly payments	2034-08-15		None
2034-09-15	\$670.00	180 mon	thly payments	2049-08-15		None

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Company	Sta	rt Date	Cost	Payout	Rate	Status
American General	202	25-02-18	\$43,310	\$63,000	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-02-18	\$350.00		thly payments	2040-01-18		None
Symetra	· .	25-04-01	\$116,727	\$143,264	6.25 %	Pre-order (c)
Start Date	Income Amount			End Date		
2025-04-01	\$2,807.00		ments/Frequency	2026-01-01		COLA/Amount None
2023-04-01		10 monthly payments			3%	Annual Increase
2026-02-01	\$2,892.00	36 monthly payments		2029-01-01	3707	Each February
2047-01-01	\$7,917.00	1 lump sum		2047-01-01		None
Prudential	202	25-04-02	\$122,319	\$150,000	5.25 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-04-02	\$50,000.00	1 lu	ımp sum	2025-04-02		None
2030-04-02	\$100,000.00	1 lu	ımp sum	2030-04-02		None
Jnited States Life Ir the City of NY	nsurance Co in 202	25-05-30	\$122,448	\$181,147	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-05-30	\$35,000.00	1 lu	ımp sum	2025-05-30		None
2030-05-30	\$45,000.00	1 lu	ımp sum	2030-05-30		None
2035-05-30	\$101,147.00	1 lu	ımp sum	2035-05-30		None
Prudential Life	202	25-08-03	\$149,410	\$261,920	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-08-03	\$13,096.00	20 annı	ual payments	2044-08-03		None
Canada Life	202	25-08-26	\$159,636	\$168,000	4.50 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2025-08-26	\$168,000.00		ımp sum	2025-08-26		None
MetLife	202	26-01-01	\$221,929	\$283,313	5.80 %	Pre-order (c)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2026-01-01	\$4,970.00		thly payments	2026-10-01		None
2026-11-01	\$8,985.00	26 mont	hly payments	2028-12-01		None
Talcott	202	26-01-10	\$71,274	\$116,720	6.25 %	Pre-order (c)
Start Date	Income Amount	No. of Pav	ments/Frequency	End Date		COLA/Amount
2026-01-10	\$715.00		thly payments	2034-12-10		None
	·		thly payments	2041-07-10		None
2035-01-10	\$500.00	79 1110110	, , ,			
	·	26-01-12	\$36,214	\$49,600	5.00 %	Pre-order (c)
2035-01-10 Prudential Start Date	·	26-01-12		\$49,600 End Date		Pre-order (c) COLA/Amount

mpany	Sta	rt Date	Cost	Payout	Rate	Status
rudential Life		6-07-01	\$57,130	\$112,500	6.00 %	In Stock (f)
Start Date	Income Amount		ments/Frequency	End Date		COLA/Amount
2026-07-01	\$6,250.00	-	nual payments	2027-01-01		None
2034-02-27	\$25,000.00		sum payment	2034-02-27		None
2039-02-27	\$75,000.00		sum payment	2039-02-27		None
Pacific Life	202		\$35,640	\$53,650	6.00 %	In Stock (f)
Start Date	Income Amount		ments/Frequency	End Date		COLA/Amount
2026-08-01	\$8,000.00		sum payment	2026-08-01		None
2028-08-01	\$9,000.00	' '		2028-08-01		None
2030-08-01	\$9,000.00	•				None
2032-08-01	\$10,500.00	•	1 lump sum payment 1 lump sum payment			None
2034-08-01	\$10,500.00	1 lump sum payment		2034-08-01		None
2039-08-01	\$6,650.00	1 lump sum payment		2039-08-01		None
acific Life	202	6-10-13	\$45,684	\$55,340	4.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2026-10-13	\$27,670.00		mp sum	2026-10-13		None
2030-10-13	\$32,057.00	1 lu	mp sum	2030-10-13		None
letLife	202	7-02-10	\$96,447	\$174,960	6.00 %	inreview (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2027-02-10	\$30,000.00	1 lump s	sum payment	2027-02-10		None
2032-02-10	\$1,208.00	120 mont	thly payments	2042-01-10		None
acific Life	202	7-03-21	\$43,938	\$59,120	5.85 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2027-03-21	\$10,000.00	1 lump s	sum payment	2027-03-21		None
2027-12-21	\$570.00	51 montl	hly payments	2032-02-21		None
2029-03-21	\$10,000.00	1 lump s	sum payment	2029-03-21		None
2032-03-21	\$10,000.00	1 lump s	um payment	2032-03-21		None
alcott	202	7-06-26	\$86,325	\$100,000	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2027-06-26	\$100,000.00	1 lu	mp sum	2027-06-26		None
acific Life	202	7-07-07	\$111,901	\$195,000	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2027-07-07	\$7,500.00	10 annu	al payments	2036-07-07		None
2036-07-07	\$120,000.00	1 lu	mp sum	2036-07-07		None
rudential	202	7-08-14	\$28,015	\$45,000	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2027-08-14	\$3,000.00		al payments	2041-08-14		None

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Company	Sta	rt Date	Cost	Payout	Rate	Status	
Talcott Resolution	202	27-09-28	\$37,678	\$68,000	6.20 %	In Stock (f)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2027-09-28	\$17,000.00	1 lump :	sum payment	2027-09-28		None	
2032-09-28	\$17,000.00	1 lump :	sum payment	2032-09-28		None	
2037-09-28	\$17,000.00	1 lump :	sum payment	2037-09-28		None	
2042-09-28	\$17,000.00	1 lump :	sum payment	2042-09-28		None	
AIG	202	8-01-01	\$97,163	\$194,800	6.00 % In Stock (f)		
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2028-01-01	\$800.00	231 mon	thly payments	2047-03-01		None	
2032-04-01	\$10,000.00	1 lump :	sum payment	2032-04-01		None	
Jnited of Omaha	202	8-09-29	\$53,045	\$118,187	6.25 %	inreview (f)	
Start Date	Income Amount	No. of Pav	ments/Frequency	End Date		COLA/Amount	
2028-09-29	\$18,625.00		sum payment	2028-09-29		None	
2034-09-29	\$25,024.00	•	sum payment	2034-09-29		None	
2039-09-29	\$32,361.00	1 lump :	sum payment	2039-09-29		None	
2044-09-29	\$42,175.00	1 lump :	sum payment	2044-09-29		None	
Prudential Life	202	28-11-24	\$58,584	\$75,000	5.78 %	In Stock (f)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2028-11-24	\$75,000.00		sum payment	2028-11-24		None	
MetLife	202	9-06-13	\$170,689	\$260,737	6.00 %	In Stock (f)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2029-06-13	\$130,368.00	1 lump :	sum payment	2029-06-13		None	
2034-06-13	\$130,368.00	1 lump :	sum payment	2034-06-13		None	
Lincoln Financial	202	9-11-19	\$41,979	\$70,000	6.00 %	In Stock (f)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2029-11-19	\$20,000.00	1 lump :	sum payment	2029-11-19		None	
2034-10-19	\$25,000.00	1 lump	sum payment	2034-10-19		None	
2034-11-19	\$25,000.00	1 lump	sum payment	2034-11-19		None	
Vilcac	203	80-05-06	\$112,514	\$150,000	5.00 %	Pre-order (c)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2030-05-06	\$150,000.00	1 lu	ımp sum	2030-05-06		None	
Brighthouse Financi	al 203	31-01-18	\$18,245	\$26,500	5.86 %	In Stock (f)	
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount	
2031-01-18	\$26,500.00		sum payment	2031-01-18		None	

Company	Sta	rt Date	Cost	Payout	Rate	Status
Brighthouse Financia	al 203	31-01-18	\$50,605	\$73,500	5.86 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2031-01-18	\$73,500.00	1 lump s	sum payment	2031-01-18		None
Athene	203	34-04-27 \$39,433		\$63,997	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Pavi	ments/Frequency	End Date		COLA/Amount
2034-04-27	\$63,997.00	1 lump sum		2034-04-27		None
ymetra Life 2034		34-06-07	\$76,030	\$135,600	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2034-06-07	\$135,600.00	1 lump sum payment		2034-06-07		None
American General	203	35-02-28	\$35,578	\$63,000	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2035-02-28	\$63,000.00	1 lu	mp sum	2035-02-28		None
Prudential Life	203	36-01-24	\$107,037	\$210,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2036-01-24	\$210,000.00	1 lump s	sum payment	2036-01-24		None
Symetra Life	203	86-10-01	\$204,291	\$578,900	6.75 %	Pre-order (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2036-10-01	\$5,748.00	6 month	ly payments	2037-03-01		None
2037-04-01	\$5,920.00	84 montl	hly payments	2044-03-01		3.00%
armers	203	37-08-06	\$30,926	\$67,040	6.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2037-08-06	\$67,040.00	1 lu	mp sum	2037-08-06		None
armers	203	37-08-06	\$33,167	\$67,040	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2037-08-06	\$67,040.00	1 lu	mp sum	2037-08-06		None
Brighthouse Financia	al 203	37-09-14	\$78,616	\$169,700	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2037-09-14	\$169,700.00	1 lump s	sum payment	2037-09-14		None
Brighthouse Financia	al 203	37-09-14	\$111,184	\$240,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2037-09-14	\$240,000.00	1 lump s	sum payment	2037-09-14		None
Brighthouse Financia	al 203	37-09-14	\$74,123	\$160,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payı	ments/Frequency	End Date		COLA/Amount
2037-09-14	\$160,000.00		sum payment	2037-09-14		None

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Company	Sta	rt Date	Cost	Payout	Rate	Status
Prudential Life	203	9-08-08	\$67,899	\$166,666	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2039-08-08	\$166,666.00	1 lump s	sum payment	2039-08-08		None
USAA Life	203	39-10-03	\$35,324	\$87,500	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2039-10-03	\$87,500.00	1 lump s	sum payment	2039-10-03		None
MetLife	204	4-01-15	\$42,657	\$150,100	6.65 %	In Stock (f)
Start Date	Income Amount	No. of Pay	ments/Frequency	End Date		COLA/Amount
2044-01-15	\$150,100.00	1 lump s	sum payment	2044-01-15		None