



Athene Annuity NY Fixed Income Alternatives Worksheet

Annuities issued by
Athene Annuity & Life Assurance Company of New York

To assist clients and financial representatives in the comparison of different fixed income products in the marketplace.

Client Information

Date: _____ Client Name: _____

Product ¹	Yield (%) ² as of _____
Money market	
1 YR Treasury	
5 YR Treasury	
10 YR Treasury	
1 YR CD	
2 YR CD	
5 YR CD	

Assets in Money Market Accounts:
\$ _____

Assets in Annuities:
\$ _____

Assets coming due in CDs:
Within 1 Year:
\$ _____
\$ _____

Assets coming due in other Fixed Income:
Within 1 Year:
\$ _____
\$ _____

Within 2-5 Years:
\$ _____
\$ _____

Within 2-5 Years:
\$ _____
\$ _____

¹Money Market and Treasury yields can be found at WSJMarkets.com. CD rates can be found at bloomberg.com/markets/rates-bonds/key-rates/.

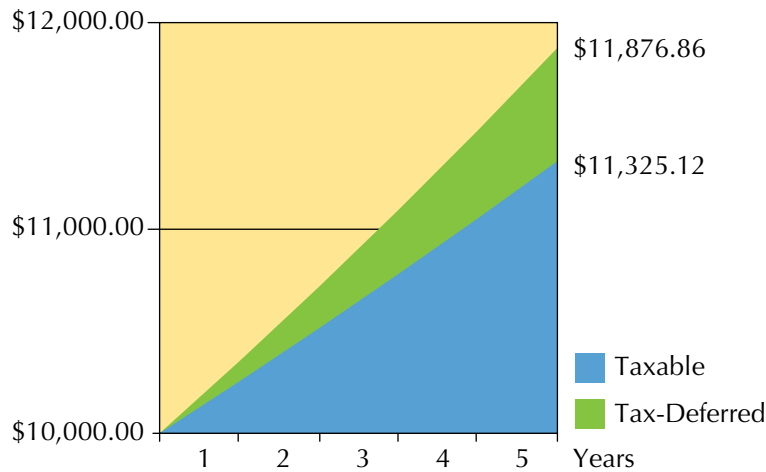
²Athene Annuity NY recommends updating these yields as they change daily. Athene Annuity NY makes no representations on the accuracy of the rates supplied by your agent.

Continued

The Advantages of Tax-Deferral

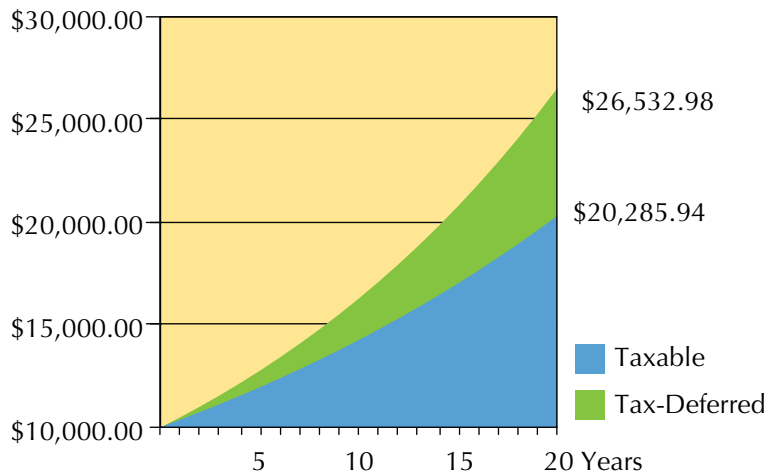
The following are two hypothetical examples of a growth of a \$10,000 taxable investment versus a tax-deferred investment:

Five Year Hypothetical



Note: Example assumes 3.5% annual interest rate and 28% tax bracket.

Twenty Year Hypothetical



Note: Example assumes 5.0% annual interest rate and 28% tax bracket.

Our Next Steps

1. Tell me more about your feelings toward annuities.
2. Let's discuss how fixed annuities can help address your financial needs and goals.
3. Now let's discuss Athene Annuity NY solutions that may be right for you.

Insurance products are issued by Athene Annuity & Life Assurance Company in all states except New York and in New York by Athene Annuity & Life Assurance Company of New York. Product availability and features may vary.

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Annuities issued by Athene Annuity & Life Assurance Company of New York, Nyack, NY.

