



HMI Group, LLC

# ANNUITY AND SETTLEMENT WORKSHEET

Homeland Mortgage Investments  
4500 Connecticut Ave, NW B1  
Washington, D.C. 20008

## BROKER INFORMATION

Phone: 202-243-3128  
Fax: 202-785-3607  
Cell: 202-487-8651

Broker Name: HMI Group, LLC Phone 202-243-3128  
Mailing Address 4500 Connecticut Ave, NW B1  
City Washington State DC Zip Code 20036



## CLIENT INFORMATION

Name \_\_\_\_\_ Phone \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

## PAYMENT INFORMATION

Annuity is the result of:  Purchased, Inherited or Gift  Court Judgment  
 Out of Court Judgment

Name of insurance company making payments \_\_\_\_\_

Policy Number \_\_\_\_\_

Annuitants name on policy \_\_\_\_\_

Payments are made  Monthly  Quarterly  Annually  Other \_\_\_\_\_

Payment amount \$ \_\_\_\_\_ Next payment is due on \_\_\_\_\_

Date first payment received Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

Are there lump sum payments?  Yes  No

List date and amount of each lump sum payment due.

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Date \_\_\_\_\_ Amount \_\_\_\_\_

Client wants to sell enough payments to raise \$ \_\_\_\_\_

Any additional comments or information \_\_\_\_\_

## QUOTE INFORMATION

Quote for full purchase \$ \_\_\_\_\_

Quote for \_\_\_\_\_ Payments \$ \_\_\_\_\_

Comments \_\_\_\_\_