

SECONDARY MARKET ANNUITIES May 20, 2024 (sorted by Start Date)					
Company	Start Date	Cost	Payout	Rate	Status
AIG	2024-06-01	\$204,917	\$499,432	6.13 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-01	\$850.00	1 monthly payments	2024-06-01	None
	2024-07-01	\$873.00	360 monthly payments	2054-06-01	3.00%
USAA Life	2024-06-01	\$522,539	\$872,423	5.98 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-01	\$3,712.00	235 monthly payments	2043-12-01	None
Independent Life	2024-06-01	\$163,379	\$240,715	5.75 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-01	\$1,337.00	180 monthly payments	2039-05-01	None
Voya Life	2024-06-01	\$64,043	\$88,402	5.63 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-01	\$585.00	151 monthly payments	2036-12-01	None
Berkshire Hathaway	2024-06-03	\$330,066	\$517,000	5.64 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-03	\$1,000.00	153 monthly payments	2037-02-03	None
	2027-03-03	\$64,000.00	1 lump sum payment	2027-03-03	None
	2032-03-03	\$100,000.00	1 lump sum payment	2032-03-03	None
	2037-03-03	\$200,000.00	1 lump sum payment	2037-03-03	None
Berkshire Hathaway	2024-06-06	\$145,832	\$276,219	5.94 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-06	\$500.00	28 monthly payments	2026-09-06	None
	2026-10-06	\$870.00	228 monthly payments	2045-09-06	3.00%
Talcott Resolution	2024-06-10	\$77,269	\$145,000	6.00 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-10	\$500.00	165 monthly payments	2038-02-10	None
	2038-10-10	\$500.00	125 monthly payments	2049-02-10	None
Lincoln Financial	2024-06-10	\$67,217	\$107,000	5.89 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-10	\$500.00	214 monthly payments	2042-03-10	None
MetLife	2024-06-15	\$324,536	\$542,960	5.97 %	In Stock (f)
	Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount
	2024-06-15	\$2,000.00	7 monthly payments	2024-12-15	None
	2025-01-15	\$2,320.00	228 monthly payments	2043-12-15	None

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Company	Start Date	Cost	Payout	Rate	Status
MetLife	2024-06-15	\$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	2024-06-15	\$85,739	\$122,689	5.50 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-15	\$400.00	119 monthly payments	2034-04-15	None	
2029-05-14	\$25,000.00	1 lump sum payment	2029-05-14	None	
2034-05-14	\$50,000.00	1 lump sum payment	2034-05-14	None	
MetLife	2024-06-15	\$230,501	\$286,068	5.43 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-15	\$2,777.00	103 monthly payments	2032-12-15	None	
MetLife	2024-06-16	\$70,247	\$119,498	5.99 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-16	\$450.00	7 monthly payments	2024-12-16	None	
2025-01-16	\$493.00	236 monthly payments	2044-08-16	None	
John Hancock	2024-06-20	\$274,421	\$576,564	6.01 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-20	\$1,300.00	6 monthly payments	2024-11-20	None	
2024-12-20	\$1,300.00	300 monthly payments	2049-11-20	3.00%	
AIG	2024-06-26	\$61,867	\$92,000	5.77 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-26	\$500.00	184 monthly payments	2039-09-26	None	
Talcott Resolution	2024-06-28	\$277,641	\$659,110	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-06-28	\$1,100.00	91 monthly payments	2031-12-28	None	
2032-01-28	\$2,070.00	270 monthly payments	2054-06-28	None	
USAA Life	2024-07-07	\$87,532	\$106,725	5.32 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-07-07	\$390.00	15 monthly payments	2025-09-07	None	
2025-10-07	\$750.00	60 monthly payments	2030-09-07	None	
2025-10-07	\$20,000.00	1 lump sum payment	2025-10-07	None	
2030-10-07	\$35,875.00	1 lump sum payment	2030-10-07	None	

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Company	Start Date	Cost	Payout	Rate	Status
MetLife	2024-07-08	\$181,377	\$278,647	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-07-08	\$987.00		2039-07-08	None	
2029-08-08	\$45,000.00	1 lump sum	2029-08-08	None	
2039-08-08	\$55,000.00	1 lump sum	2039-08-08	None	
Prudential	2024-08-23	\$93,037	\$150,100	5.75 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-08-23	\$550.00	22 monthly payments	2026-05-23	None	
2026-06-23	\$650.00	60 monthly payments	2031-05-23	None	
2031-06-23	\$750.00	60 monthly payments	2036-05-23	None	
2036-06-23	\$900.00	60 monthly payments	2041-05-23	None	
MetLife	2024-08-25	\$579,873	\$1,532,130	6.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-08-25	\$2,870.00	179 monthly payments	2039-06-25	None	
2033-06-25	\$45,000.00	1 lump sum	2033-06-25	None	
2043-06-25	\$55,000.00	1 lump sum	2043-06-25	None	
MetLife	2024-08-25	\$385,759	\$613,730	6.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-08-25	\$2,870.00	179 monthly payments	2039-06-25	None	
2033-06-25	\$45,000.00	1 lump sum	2033-06-25	None	
2043-06-25	\$55,000.00	1 lump sum	2043-06-25	None	
Berkshire Hathaway	2024-09-17	\$338,872	\$677,360	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-09-17	\$15,000.00	1 lump sum payment	2024-09-17	None	
2024-09-17	\$1,701.00	360 monthly payments	2054-08-17	None	
2027-09-17	\$50,000.00	1 lump sum payment	2027-09-17	None	
Pacific Life	2024-11-12	\$49,424	\$63,450	5.32 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2024-11-12	\$5,000.00	4 annual payments	2027-11-12	None	
2030-11-12	\$43,450.00	1 lump sum payment	2030-11-12	None	
New York Life	2025-01-01	\$322,096	\$522,874	5.82 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-01-01	\$960.00	36 monthly payments	2027-12-01	None	
2028-01-01	\$2,163.00	156 monthly payments	2040-12-01	None	
2028-04-26	\$51,520.00	1 lump sum payment	2028-04-26	None	
2033-04-26	\$51,520.00	1 lump sum payment	2033-04-26	None	
2038-04-26	\$47,840.00	1 lump sum payment	2038-04-26	None	

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Company	Start Date	Cost	Payout	Rate	Status
John Hancock	2025-01-15	\$70,286	\$155,446	6.01 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-01-15	\$300.00	116 monthly payments	2034-08-15	None	
2034-09-15	\$670.00	180 monthly payments	2049-08-15	None	
United States Life Insurance Co in the City of NY	2025-05-30	\$120,481	\$181,147	5.75 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-05-30	\$35,000.00	1 lump sum	2025-05-30	None	
2030-05-30	\$45,000.00	1 lump sum	2030-05-30	None	
2035-05-30	\$101,147.00	1 lump sum	2035-05-30	None	
Pacific Life	2025-06-01	\$93,865	\$117,633	5.40 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-06-01	\$526.00	24 monthly payments	2027-05-01	None	
2025-06-01	\$15,000.00	2 annual payments	2026-06-01	None	
2027-05-14	\$25,000.00	1 lump sum payment	2027-05-14	None	
2032-05-14	\$50,000.00	1 lump sum payment	2032-05-14	None	
Prudential Life	2025-08-03	\$149,410	\$261,920	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-08-03	\$13,096.00	20 annual payments	2044-08-03	None	
Canada Life	2025-08-26	\$158,768	\$168,000	5.25 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-08-26	\$168,000.00	1 lump sum	2025-08-26	None	
John Hancock	2025-10-15	\$126,217	\$184,752	5.66 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-10-15	\$1,283.00	144 monthly payments	2037-09-15	None	
Prudential Life	2025-12-05	\$290,684	\$436,000	6.00 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-12-05	\$100,000.00	1 lump sum payment	2025-12-05	None	
2030-12-05	\$150,000.00	1 lump sum payment	2030-12-05	None	
2035-12-05	\$186,000.00	1 lump sum payment	2035-12-05	None	
Prudential	2026-01-12	\$35,089	\$49,600	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-01-12	\$400.00	124 monthly payments	2036-04-12	None	
Symetra	2026-04-03	\$92,687	\$210,416	5.75 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-04-03	\$584.00	360 monthly payments	2056-03-03	3% Annual Increase Each April	

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Company	Start Date	Cost	Payout	Rate	Status
Prudential Life	2026-07-01	\$57,130	\$112,500	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-07-01	\$6,250.00	2 semi-annual payments	2027-01-01	None	
2034-02-27	\$25,000.00	1 lump sum payment	2034-02-27	None	
2039-02-27	\$75,000.00	1 lump sum payment	2039-02-27	None	
Pacific Life	2026-08-01	\$35,640	\$53,650	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-08-01	\$8,000.00	1 lump sum payment	2026-08-01	None	
2028-08-01	\$9,000.00	1 lump sum payment	2028-08-01	None	
2030-08-01	\$9,000.00	1 lump sum payment	2030-08-01	None	
2032-08-01	\$10,500.00	1 lump sum payment	2032-08-01	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	
Pacific Life	2026-10-13	\$45,684	\$55,340	4.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2026-10-13	\$27,670.00	1 lump sum	2026-10-13	None	
2030-10-13	\$32,057.00	1 lump sum	2030-10-13	None	
Berkshire Hathaway	2027-01-01	\$278,383	\$935,482	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2025-02-01	\$59.00	24 annual payments	2048-02-01	3% Annual Increase Each February	
2027-01-01	\$807.00	9 monthly payments	2027-09-01	None	
2027-10-01	\$831.00	252 monthly payments	2040-09-01	3% Annual Increase Each October	
2048-10-01	\$3,640.00	108 monthly payments	2058-09-01	3% Annual Increase Each October	
2049-02-01	\$12,136.00	10 annual payments	2058-02-01	3% Annual Increase Each February	
MetLife	2027-02-10	\$96,447	\$174,960	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2027-02-10	\$30,000.00	1 lump sum payment	2027-02-10	None	
2032-02-10	\$1,208.00	120 monthly payments	2042-01-10	None	
Pacific Life	2027-03-21	\$43,938	\$59,120	5.85 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2027-03-21	\$10,000.00	1 lump sum payment	2027-03-21	None	
2027-12-21	\$570.00	51 monthly payments	2032-02-21	None	
2029-03-21	\$10,000.00	1 lump sum payment	2029-03-21	None	
2032-03-21	\$10,000.00	1 lump sum payment	2032-03-21	None	
Prudential	2027-08-14	\$26,297	\$45,000	5.75 %	Pre-order (c)

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2027-08-14	\$3,000.00	15 annual payments	2041-08-14	None

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Talcott Resolution	2027-09-28	\$37,678	\$68,000	6.20 %	In Stock (f)
Start Date	Income Amount	No. of Payments/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	2028-01-01	\$97,163	\$194,800	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2028-01-01	\$800.00	231 monthly payments	2047-03-01	None	
2032-04-01	\$10,000.00	1 lump sum payment	2032-04-01	None	
Prudential Life	2028-03-24	\$58,443	\$72,000	5.75 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2028-03-24	\$72,000.00	1 lump sum payment	2028-03-24	None	
United of Omaha	2028-05-15	\$54,323	\$71,000	5.84 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2028-05-15	\$40,000.00	1 lump sum payment	2028-05-15	None	
2030-05-15	\$31,000.00	1 lump sum payment	2030-05-15	None	
United of Omaha	2028-09-29	\$53,045	\$118,187	6.25 %	inreview (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2028-09-29	\$18,625.00	1 lump sum payment	2028-09-29	None	
2034-09-29	\$25,024.00	1 lump 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	2028-11-24	\$58,584	\$75,000	5.78 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2028-11-24	\$75,000.00	1 lump sum payment	2028-11-24	None	
Prudential Life	2029-01-01	\$125,492	\$238,731	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2029-01-01	\$50,000.00	1 lump sum payment	2029-01-01	None	
2034-01-01	\$70,000.00	1 lump sum payment	2034-01-01	None	
2039-01-01	\$80,000.00	1 lump sum payment	2039-01-01	None	
2044-01-01	\$38,731.00	1 lump sum payment	2044-01-01	None	
MetLife	2029-06-13	\$170,689	\$260,737	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/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	

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Lincoln Financial	2029-11-19	\$41,979	\$70,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/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	
BrightHouse Financial	2031-01-18	\$50,605	\$73,500	5.86 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2031-01-18	\$73,500.00	1 lump sum payment	2031-01-18	None	
BrightHouse Financial	2031-01-18	\$18,245	\$26,500	5.86 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2031-01-18	\$26,500.00	1 lump sum payment	2031-01-18	None	
Athene	2034-04-27	\$39,433	\$63,997	5.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-04-27	\$63,997.00	1 lump sum	2034-04-27	None	
Symetra Life	2034-06-07	\$76,030	\$135,600	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-06-07	\$135,600.00	1 lump sum payment	2034-06-07	None	
MetLife	2034-12-11	\$159,273	\$332,121	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2034-12-11	\$4,001.00	83 monthly payments	2041-10-11	None	
American General	2035-02-28	\$33,827	\$63,000	6.00 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2035-02-28	\$63,000.00	1 lump sum	2035-02-28	None	
Prudential Life	2036-01-24	\$107,037	\$210,000	6.00 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2036-01-24	\$210,000.00	1 lump sum payment	2036-01-24	None	
Symetra Life	2036-10-01	\$204,291	\$578,900	6.75 %	Pre-order (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2036-10-01	\$5,748.00	6 monthly payments	2037-03-01	None	
2037-04-01	\$5,920.00	84 monthly payments	2044-03-01	3.00%	
BrightHouse Financial	2037-09-14	\$71,852	\$160,000	6.25 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$160,000.00	1 lump sum payment	2037-09-14	None	

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Company	Start Date	Cost	Payout	Rate	Status
Brighthouse Financial	2037-09-14	\$76,208	\$169,700	6.25 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$169,700.00	1 lump sum payment	2037-09-14	None	
Brighthouse Financial	2037-09-14	\$107,779	\$240,000	6.25 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2037-09-14	\$240,000.00	1 lump sum payment	2037-09-14	None	
Prudential Life	2039-08-08	\$67,899	\$166,666	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2039-08-08	\$166,666.00	1 lump sum payment	2039-08-08	None	
USAA Life	2039-10-03	\$35,324	\$87,500	6.13 %	In Stock (f)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2039-10-03	\$87,500.00	1 lump sum payment	2039-10-03	None	
Brighthouse Life	2040-05-11	\$51,462	\$120,000	5.50 %	Pre-order (c)
Start Date	Income Amount	No. of Payments/Frequency	End Date	COLA/Amount	
2040-05-11	\$120,000.00	1 lump sum	2040-05-11	None	

Secondary Market Annuities (SMAs) are policies being transferred by an annuitant pursuant to state transfer laws. Annuities listed are subject to prior purchase, prior sale, or withdrawal by seller. Interest, payments, and prices are calculated using industry standards. All information in this list is subject to change and is not guaranteed. In case of a discrepancy, information in the final closing documents will govern.