

Carolina Insurance Shopper LLC

704-746-6184

**INVESTMENT PLAN COMPARISON
THE ANNUITY vs. MUTUAL FUNDS**

	ANNUITY	MUTUAL FUNDS
Is the investment free from market risks?	YES	NO
Is the investment guaranteed 100% safe?	YES	NO
Does the investment plan pay high yields?	YES	YES
Is the investment plan invested in a multibillion dollar industry, and are the assets that back the investment plan regulated by the US Government?	YES	NO
Does the investment plan earn interest on both principal and interest?	YES	NO
Does the investment plan avoid probate?	YES	NO
Is the interest earned each year free from income taxation when not received?	YES	NO
Does the investment provide a guaranteed monthly income that you cannot outlive?	YES	NO
Does the investment plan reduce the potential Social Security tax?	YES	NO
Can you withdraw any plan assets without liquidating your position and incurring a penalty?	YES	NO
Can the investment plan be exchanged for a like plan without creating a taxable event?	YES	NO
Is there a guaranteed minimal rate of return regardless of market rates of return?	YES	NO
Is the investment protected from creditors?	YES	NO