



April 7, 2026

American National

Annuity Watch

[In this issue:](#)

- Fast Facts on IRAs
- New! AI Driven Document Review in FireLight
- Discover Annuity Solutions That Work
- Access All Training Guides in One Convenient Spot

Athene

Athene ranked #1 in U.S. annuity sales for third year – [Read the bulletin.](#)

Corebridge Financial (American General)

Important product & illustration updates

Effective March 28th we are making the following changes:

- **2026 IRS Per Diem Limits** – impacting Accelerated Access Solution (AAS) Chronic Illness Rider benefits, and
- Updated **NAIC Actuarial Guideline 49-A requirements** impacting how historical index returns are shown in IUL illustrations

[Review the bulletin for more details.](#)

Answers to Income for Life rider questions

[Get answers](#) to frequently asked questions regarding the unique Income for Life rider on [Max Accumulator+ IUL](#).

Questions like:

- When can I elect this rider?
- How is my income stream determined upon electing the rider?
- Is my death benefit available after I elect the rider?

Corebridge Financial and Equitable Holdings Announce Transformational Merger

[Read the announcement.](#)

Annuity Updates

[In this issue:](#)

- It's time to get the annuity conversation started
- The Elite Producer Compensation program – end of quarter is approaching!
- NY Regulation 60 – reminders to avoid delays
- Update to annuity contract delivery process
- Arkansas Replacement Memorandum – field addition

Gerber Life

NOW AVAILABLE - Signature by Text Message

The new feature - signature by text message/SMS - is now available on Gerber eApplications.

[See this short guide](#) for an overview of what to expect and a few items to assist in troubleshooting any issues.

John Hancock

Deliver an IUL that gives strong illustrated performance AND a seamless process

What can affect an IUL case:

- Complicated policy reviews
- Limited index choices
- A slow new business process

Close the gaps with John Hancock

- SmartStart Segments for clearer first year policy reviews
- More diversification (Nasdaq, S&P, Barclays)
- Competitive decisions, with streamlined underwriting to \$5M via ExpressTrack

Download the [Accumulation IUL producer guide](#). Download the [Protection IUL producer guide](#).

Lincoln Financial Group

Income that keeps going

Losing a spouse is hard enough. Losing part of the household income on top of that makes it even tougher.

[In scenario #4 from this collection of case studies](#), each spouse had their own annuity contract with Estate Lock, so when the first spouse passed away, the survivor kept their income and received the full investment amount from the other contract. It's a thoughtful way to bring added security when it's needed most.

RMDs eating into client legacy?

A lot of clients are concerned while watching RMDs slowly chip away at what they plan to leave their loved one.

[Scenario #2 in this collection of case studies](#) shows how a Lincoln annuity with Estate Lock helped one client meet RMDs and still protect the full investment amount for their beneficiaries. It's a nice way to calm those "forced withdrawal" concerns.

Lincoln Leader for Fixed Annuities

[In this issue:](#)

- NEW: FIA Income Annuities
- Product and rider details
- NEW: Lincoln Indexed Annuity Income Calculator
- NEW: New Indexed Accounts on FlexAdvantage
- Digital Rate Sheets Launch
- Introducing Paperless Annuity Carrier-to-Carrier Replacements
- IRA contribution information

MassMutual

UL Guard - Guaranteed Protection Built for Long Term Planning

Why should MassMutual's UL Guard be considered as a permanent life insurance solution for clients age 45-75? [Take a look at the standout features.](#)

Changes made to address coverage gaps for top-earning executives

MassMutual has increased issue and participation limits for their Executive Select Program, giving eligible high-earning executives access to more individual disability income (DI) coverage beyond standard thresholds. [Learn more and access materials.](#)

MMSD Underwriting

[In this issue:](#)

- Updated! Life Field UW Guide
- Life UW Requirements Guide
- DI Executive Select Program
- April 8 webinar: Underwriting Cardiomyopathy

Mutual / United of Omaha

Updated and improved face amounts for our IUL Express (IULE) and Term Life Express (TLE)

Effective April 1, 2026, Mutual of Omaha is increasing the maximum face amounts available on IUL Express (IULE) and Term Life Express (TLE). This enhancement gives producers more flexibility to recommend coverage that better aligns with today's incomes, mortgages, and protection needs.

What's Improved*

Issue Ages	Current	New
18-50	\$300,000	\$550,000
51-60	\$250,000	\$450,000
61+	\$150,000	\$350,000

Express

[In this issue:](#)

- Higher face amounts for TLE & IULE
- Don't Chase the Flashiest Bracket-Play the One That Wins
- Simplified Underwriting. Meaningful Protection. Living Promise.
- Stand Out with LTC Strength: How We Stack Up
- A Simple LTC Conversation Starter: "Can You Afford Not To?"
- Critical Illness - Security and Savings with Return of Premium
- Cancer and Heart Disease Trends: What Clients Need to Know in 2026 and Beyond

North American Annuity

Make retirement conversations easier with client-ready videos

Introducing the [Annuity 101 video series](#), a collection of short, client-friendly videos you can instantly share on social media to make retirement planning conversations easier with clients and prospects.

Protective Life

Short pays, single pays and 1035 exchanges welcome

Clients need the flexibility to choose a premium option that works best for their needs. Protective Lifetime Assurance UL now accepts short pays, single pays and 1035 exchanges in addition to ongoing premiums for new policies.

Clients can also benefit from:

- Guaranteed coverage up to age 121
- Return of premium endorsement provides access to paid premiums at no additional cost
- Optional ExtendCare rider to help offset the costs of chronic illness-related expenses

In the Loop

[In this issue:](#)

- Don't miss out on our term life incentive
- A smarter way to view your life insurance business
- Accelerated underwriting enhancements now available in California
- Executive Exam Substitution Program
- New payment options for Lifetime Assurance UL
- Download 2025 tax documents now — secure, easy and online

Prudential Financial

Life Essentials

[In this issue:](#)

- April 9 webinar: The Power of Life Insurance: Larger Inheritances. More Control. Less Tax.
- Trimester Sales Strategies: Risks to Retirements
- Index Account Changes Q2 2026
- The 2026 Easy Reference Tax Guide
- EssentialTerm Suite: Important planned enhancements for new business submission
- New in LifeInsight: Expanded Book of Business access & self-service tools
- Life Policy Package access
- Welcoming policyholders with consistency and purpose
- Service quick pip: Prusign eDelivery authentication

Securian Financial

Life insurance multi-tool

Elevate your clients' overall financial strategy. Use [Life Insurance as a Financial Tool \(LIFT\)](#) to help them:

- Protect their family
- Supplement their retirement income
- Leave a lasting legacy

This [financial professional guide](#) will show you how.

One case. One story. A third bucket for retirement

High earners are maxing out plans and hitting Roth limits. They need another retirement income conversation. That's what we're here to help you deliver. [Learn more and watch the webinar replay.](#)

Symetra

Help clients earn interest in flat markets with trigger rate

What's the significance of 81%?

It's the percentage of time when the Nasdaq 100® Index has had returns of 0% or greater since its inception. A trigger rate option that credits interest in flat or positive index years can help support more consistent accumulation. ([See the bulletin.](#))

This [trigger rate feature](#) is now available on all Symetra Edge Elite fixed indexed annuity indexed accounts.

Here's how a 7% trigger rate could look:

- 0% index return = 7% interest credited
- 7% index return = 7% interest credited
- 10% index return = 7% interest credited