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Bi-Weekly Newsletter

February 24, 2026

American National

Annuity Watch

[In this issue:](#)

- Unlocking Financial Stability
- 2026 Contribution Limits
- Annuity Product Portfolio
- Update to LAD Website Mega Menu
- Unveiling the invisible generation – Annuity solutions for Gen X

Athene

Athene Accelerate

[In this issue:](#)

- Latest tax updates and 3 key tax benefits for clients
- A new retirement is taking shape
- Understanding the tax and planning implications of Roth IRA conversions
- Will technology affect your clients' retirement planning?
- Refresh your financial mindset
- March 5 webinar: IRA beneficiary rules after the SECURE Act

Corebridge Financial (American General)

Create a lifetime income stream with an IUL by leveraging the Income for Life Rider

Show clients how they can turn IUL cash value into a lifetime income stream with the Max Accumulator+ Income for Life rider.

- Supplement retirement income sources
- Offset cost of living increases
- Plus provide a death benefit

Few carriers offer this feature – differentiate yourself and help clients get the most out of their accumulation IUL.

Get resources for [Max Accumulator+](#). See the [Income for Life rider FAQ](#). Share the [consumer brochure](#).

Annuity Updates

[In this issue:](#)

- Power Series Index Annuities – Product Modernization
- The Elite Producer Compensation Program (EPCP) has been extended through 2026!
- Guidelines for annuity sales to non-U.S. citizens
- Understanding the Certification of Trust Form
- IRI Paperless Exchange Initiative

Illinois Mutual

DI Coverage for Starting Professionals

Illinois Mutual offers disability income insurance (DI) coverage to individuals who are near completion of apprenticeships, licensing or accredited certification programs. The monthly benefit amount and options available will be based upon the intended occupation and expected income level. [Learn more.](#)

John Hancock

A historic step forward in early cancer detection

This week marks a historic milestone for early cancer detection in America, as Congress passed legislation creating a future pathway for Medicare coverage of FDA approved multi cancer early detection tests.

Early detection can change outcomes. Screenings like GRAIL's Galleri test, available to eligible Vitality PLUS members, are designed to detect cancer earlier — often before symptoms appear.

[Watch this real-life impact video.](#) Sandy, a John Hancock Vitality customer, attests to the impact of early detection as she reveals how her cancer diagnosis gave her a chance for more cherished moments with family.

Policy crediting rate and indexed account parameter changes – [Read the bulletin.](#)

You could be at Platinum Status

With [John Hancock Vitality PRO](#), your eligible sales and client engagement activities automatically earn you points towards a status. All you have to do is download the app, discover your status and redeem your rewards.

Unlock VIP experiences, fully discounted health memberships, and more exclusive rewards just by getting credit for the business you've already done.

Lincoln Financial Group

Have you considered this cash alternative?

How are you helping clients who are jumping to cash for safety and exposing themselves to significant inflation risk?

Lincoln OptiBlend fixed indexed annuity is a cash alternative with higher return potential than traditional deposit accounts. In addition to the option for a fixed rate, investors have the opportunity to earn interest linked to market performance – with no exposure to market losses. [Get more details here.](#)

Competitive short-pay premiums

UL Guard is a solution that can help clients protect their long-term goals and serves as a strong option for those who want to enhance their estate planning strategies. [Access the UL Guard Playbook](#) for resources designed to support client conversations.

debrief60

[In this issue:](#)

- Life & DI 2026 vision and leadership announcement
- Digital Playbooks: UL Guard
- Retirement Reimagined: A Powerful Combination
- New DI Persona Case Study for Attorneys
- Dividend Difference resource page updated for 2026
- ESVR and GI Rate Class launch call recap
- ALIR limits increased to better meet client needs
- Discover the Business Loan Protection Rider
- Why BOE Matters: Hear Jane's Story
- Delivering more value than ever before: MassMutual's reimagined BOE
- Soundbite: Loan Regime Split Dollar
- NEW DI insurance underwriting enhancements
- Navigating impairments with MMSD: COPD and Asthma Recap
- Underwriting Uncovered: Recap of Atrial Fibrillation webinar and the 2026 monthly webinar series
- New consumer notice protocols for Life and DI insurance underwriting debut

Mutual / United of Omaha

The Closing Concept

The Social Security Pivot: Turning "Simple" Questions into Retirement Income Strategies

- Watch the [video](#).
- Download the [strategy](#).
- [Your guide to Social Security Benefits Brochure](#) (for clients)
- [SPIA Sales Solutions Flyer](#) (for producers)
- [Provide Your Clients with Protection: LPA Flyer](#) (for producers)
- [2026 Tax Reference Guide](#) (for producers)

Express Newsletters

[In this issue:](#)

- Your Updated SPA Experience Is Almost Here
- Protection May Be the Most Romantic Gift of All
- Learn the Basics: Living Promise
- Long-Term Care Business Updates: Service Enhancements and Leadership Changes
- Have You Seen Our Latest LTC Sales Idea Videos?

[In this issue:](#)

- Cancer and Heart Disease Trends: What Clients Need to Know in 2026 and Beyond
- Out-of-Pocket Costs Are Rising-Even with Health Insurance. Here's a Smarter Way to Prepare.
- Annuities - Flexibility. Protection. Strength.
- 1099's

Nationwide

Streamlined term coverage now available for executive clients

Nationwide Guaranteed Level Term is now offered through the [Executive Advantage Program](#), allowing busy executives to secure term coverage with the benefit of a streamlined, convenient underwriting process.

Life policy management guide now available

Nationwide's new [policy management guide](#) explains life insurance policy tools that help streamline processes, save time, and support clients seamlessly across the entire policy lifecycle.

Practical Social Security insights you can use now

Social Security is a vital but may be an insufficient retirement income source, with potential benefit cuts after 2033, higher lifetime payouts from delaying claims to age 70, inflation protection, survivor income risk, and the need for coordinated claiming and supplemental income strategies. [Read more.](#)

North American Annuity

Strengthen your clients' Social Security strategy

As clients look ahead to retirement, Social Security is often one of the most important – and most confusing – topics on their minds. You can help turn uncertainty into confidence using the Social Security tools found inside the [Financial Home Makeover magazine and online resource library](#).

Pacific Life - Lynchburg

Field News Monthly

[In this issue:](#)

- The scoop on the refreshed pricing of PL Promise Term
- How PL Promise Term stacks up against the competition
- Discover the many ways PL Promise Term delivers more than death benefit protection
- 2026 Federal Tax Amounts and Limits

Protective Life

Help clients understand how underwriting works

Getting life insurance can be easier than clients think. Protective helps streamline the process with easy applications and multiple underwriting paths, including:

- Fastest instant approval in 3 minutes for qualifying clients who can accept policy electronically.
- Accelerated underwriting in as little as 3 days with no medical exams and minimal health questions.

[This resource](#) makes it easy to educate clients on their underwriting options

Prudential Financial

Entitlement Benefits and the Retirement Gap - [Access the February sales kit.](#)

Life Essentials

[In this issue:](#)

- Entitlement Benefits and the Retirement Gap
- Survivorship Index UL 2025: Availability in FL, DC & UT
- Rethinking life insurance as a living asset
- Underwriting: Support for even larger cases
- EssentialTerm Suite: Important planned enhancements for new business submission
- New Business forms revisions for Survivorship Index UL 2025 for FL and Washington, D.C.

Symetra

Symetra Increases to \$55M Autobind Limit

Symetra has increased their autobind limit from \$35M to \$55M, giving them significantly more capacity to move quickly on large cases—without added friction or delays. Simply put, they are ready for large-case business and positioned to execute efficiently at higher face amounts.

National Cancer Prevention Month: Help your clients take action

This month, be a part of your clients' preventative health and well-being by introducing them to Symetra's Cancer Care Compass - a rider package available on their core indexed universal life products. It provides access to resources and guidance to help them live healthier today, plus a lump sum payout should the insured face a covered cancer diagnosis in the future. [Learn more.](#)

The cost of cancer: Preparing for the unexpected

Navigating the emotional and physical challenges of a cancer diagnosis is already difficult. But when combined with a loss of income, increasing medical bills and daily living costs, the financial burden for patients can make the diagnosis even more complicated.

While no one can predict a cancer diagnosis, there are steps clients can take to help protect themselves and their loved ones against the financial strains associated with the illness. [Read more.](#)

Western & Southern Financial (Integrity Life)

New DIA Calculator Fuels Future Income Discussions

A new [deferred income payouts calculator](#) is ready for your use with income-interested clients. Create monthly income quotes by either amount contributed or amount desired. Funding sources can be qualified, nonqualified or QLAC.

AnnuiTeasers

Attract the attention of annuity prospects – fast! Share our short [Annui-Teaser videos](#). Use them to kick-start retirement conversations in under 20 seconds.