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June 30, 2026

American National

Annuity Watch

In this issue:

- Enhancements to Smart Start Accumulator Series
- New digital rate page
- Be FireLight fast
- Qualifying for 2027 Partner Conference

Athene

Pairing Life Insurance with Lifetime Income

You've already nailed the hardest part of this business; getting clients to face mortality and protect the people who depend on them. Here's how to finish that conversation and roughly double your revenue per client without finding anyone new.

Here's the idea in one sentence: a life policy protects your client's family if they die too soon, and an indexed annuity with a lifetime income rider protects the client if they live too long. Same client, same unknown. How long they'll live solved from both directions. You're not selling two products; you're closing the gap your competitors leave open.

The product solution to pair with your life cases is the Athene Ascent Pro Bonus. Premium bonus that boosts value on day one, a guaranteed roll-up on the income base while the client waits, three payout options, principal protected from market losses and Athene is the #1-selling FIA carrier in the country.

Keep this resource - the two-risk story - at your desk. It provides why this product fits, the language to bridge from the life sale into the annuity, and quick objection handling.

Corebridge Financial (American General)

Max Accumulation+ III IUL is Getting Stronger – and More Diversified

An important update to Max Accumulator+ III is coming June 29, 2026. This product update is designed to enhance your accumulation story and client conversations. Get details.

John Hancock

Strengthen every IUL case with living benefits + Vitality

When you offer our leading Protection IUL and Accumulation IUL products, your recommendations automatically gain added value through a comprehensive suite of living benefits designed to meet today's extended-care and wellness needs. See the benefits.

Lincoln Financial Group

Can LTC Premium Be Deductible?

Yes, in certain situations, premium on the MoneyGuard Fixed Advantage (2025) can be deductible. Want to start leaning how and when? Watch this short, 6-minute video.

NEW LTC Pre-Check - a simple way to get started

Lincoln introduces LTC Pre-Check, a new, online pre-submission tool to help determine if clients may qualify for Lincoln MoneyGuard solutions. Check it out!

Stretching NQ Assets with Protection

When working with clients who inherit non-qualified annuities, they usually face three options:

- Lump Sum – fully taxable in year of receipt.
- 5-Year Rule – short deferral, but all taxes due within five years.
- Lifetime Stretch – distributions spread across life expectancy.

By leveraging OptiBlend Fixed Indexed Annuity as the stretch vehicle, you can provide your clients with:

- Principal Protection – safeguarding inherited dollars against market volatility.
- Upside Growth Potential – linked to market indexes while avoiding downside risk.
- Spread out the taxes – give clients the ability to take taxable distributions gradually over their life expectancy.
- No Additional Cost – protection built into the product design.

This approach allows advisors to help clients preserve inherited wealth, optimize distribution strategies, and offer peace of mind in an uncertain market.

MassMutual

debrief60

In this issue:

- For a limited time, get a complimentary 5x7 photo frame
- New one-pager: A Portfolio Built for the Client Life Cycle
- New Living Well Rider for eligible whole life policies
- ICYMI: Disability Income Awareness Month Toolkit
- Join our monthly webinar series
- New Life Underwriting updates
- Review the Cardiomyopathy and Lupus recaps
- DI Underwriting changes enable faster, simpler business processes
- New WL 100 Success Story
- From IUL to Whole Life: A Client Case Study
- Producer delegate enhancement launched March 31 on the MMSD Portal
- A legacy of purpose. A future of possibilities.

Mutual / United of Omaha

Annuity Awareness Month

When clients are considering an annuity, they're not just weighing the product - they're deciding whether or not to trust the promise.

They want to know the income they're counting on will be there when they need it. They want to feel confident in the company standing behind that guarantee. And they want to work with someone who can help make the decision feel clear, credible and right for their future. That's where Mutual of Omaha can help.

For generations, brokers and clients have trusted our brand for protection, strength and stability. That confidence is backed by strong financial ratings from leading rating agencies, including A+ S&P Global Ratings, A1 Moody's Investors Service and A+ A.M. Best.

Now, you can bring that same strength into retirement income planning. Mutual of Omaha annuity solutions give you another way to help clients protect what they've built and prepare for what's ahead. Because guaranteed income is only as strong as the company behind it — and Mutual of Omaha is a name built to stand behind important promises.

Express

In this issue:

- In-force LTCi Rate Adjustments Effective October 1
- Critical Advantage vs. Other CI Products: What Sets It Apart?
- Out-of-Pocket Costs Are Rising-Even with Health Insurance. Here's a Smarter Way to Prepare.

North American Annuity

Social Security insights to help win more client conversations – Watch the webinar replay.

OneAmerica

Sandwich-gen clients: Competing priorities bite into plans

Sandwich generation clients are balancing retirement goals, rising expenses, and the realities of caring for aging parents while also supporting children at home. Many in their 40s are realizing that long term care planning can't wait, but they need an approach that fits alongside competing financial priorities. A stacking strategy can give them a practical way to begin early, stay protected as life evolves, and build toward meaningful long term care security over time.

Here are some advantages your clients can gain from this approach:

- Clients can secure coverage earlier when premiums are generally more affordable.
- They can lock in insurability to provide some level of protection in case their health changes in the future.
- Their coverage can build over time as major expenses drop or as their needs evolve.
- Clients have flexible care choices and concierge support to help navigate their long-term care decisions.

Care Solutions News

In this issue:

- A larger stage, a clear purpose
- A pivotal moment for brain health
- Coming soon: eApp required for all Asset Care applications
- Beneficiary change form update

Protective Life

Guide clients through their underwriting options

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

Start the Estate Planning conversation – Visit the sales strategy site.

Life Essentials

In this issue:

- July 9 webinar: Protecting the Future of Small Business
- Long Form Application launch for EssentialTerm products
- Retirement of Term Essential - important update
- Estate Planning for All
- Strengthen your Mirrored Loans strategy with new resources
- Updated: BenefitAccess Rider vs. Other Chronic Illness and/or Terminal Illness Riders
- Upcoming password security update for clients
- 1035 Exchanges: What you need to know
- EssentialTerm Suite: Important planned enhancements for new business submission

Securian Financial

Why LTC conversations stall

"What if I never need care?" is one of the most common objections agents hear about long-term care protection. It's a valid question. Who wants to buy coverage they may never use?

This is where many conversations stall but you can help move them forward with the right solution.

SecureCare IV, Securian's newest long-term care (LTC) and whole life insurance policy, provides long-term care protection without a "use it or lose it" tradeoff. And as a cash indemnity policy, it can help you give clients something they won't grow out of: true flexibility.

SecureCare IV's long-term care benefits are paid in cash, giving your clients the freedom to choose the care they want: at home, with loved ones or in a facility. And if they don't need care, their policy provides a death benefit at least equal to the premium they paid.

SecureCare IV can help you turn a common objection into the start of a more meaningful conversation. Discover how it can help you transform objections into opportunities.

Symetra

Should your clients consider Protector IUL for a 1035 exchange?

In this case study, a client's review with his insurance professional led to a 1035 exchange (PDF) from his whole life policy into a Symetra Protector Indexed Universal Life policy.

Western & Southern Financial (Integrity Life)

Indextra Series Fixed Indexed Annuity Video

Got clients looking for a retirement path that offers upside growth potential with downside protection against market losses? Indextra FIA can help. Share the new video on this product to start a potential and protection conversation.