



May 19, 2026

## American National

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### Safe Money Thoughts

Periods of financial uncertainty often leave clients searching for stability and protection. Fixed annuities offer strong guaranteed solutions, and American National can help you deliver the secure strategies your clients are looking for. [Learn more about the benefits of fixed annuities.](#)

### Annuity Watch

[In this issue:](#)

- Earn Your Spot at the 2027 Partner Conference!
- Palladium Multi-Year Guarantee Solutions
- Be FireLight Fast
- Explore The Update That Allows 25 Commissionable Agents on One Policy
- Review the new CA Annuity Application

## Athene

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### Non-Spouse Inherited IRA Support

Support for Non-Spouse Inherited IRAs now available on select Athene products - giving you more flexibility when working with beneficiaries following the SECURE Act changes.

Effective May 4, 2026, you can submit business where the "Deceased Relationship to Annuitant" is a non-spouse, subject to product eligibility and administrative guidelines. [Learn more.](#)

## John Hancock

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LTC in-force rate action notifications for late May - [Get details.](#)

## Expanded index options = More ways to strengthen IUL performance

John Hancock's leading [Protection IUL and Accumulation IUL products](#) now include enhanced indexed account parameters and a new diversification opportunity. Key upgrades include:

- Updated caps and participation structures
- Stronger overall performance potential
- Access to the new Nasdaq Capped Indexed Account
- Broader diversification beyond traditional S&P-based strategies

## Planning opportunities after tax season

[In this new episode of Hancock Talks](#), an attorney breaks down how to leverage the post-tax season window and how it can strengthen your planning conversations.

You'll hear about navigating recent tax legislation changes, strategic retirement asset management, and the role of life insurance in comprehensive legacy planning.

## Lincoln Financial Group

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### Clients concerned with RMDs?

A lot of clients are concerned while watching RMDs slowly chip away at what they plan to leave their loved one. [Scenario #2 in the attached collection of case studies](#) shows how a Lincoln annuity with Estate Lock<sup>SM</sup> 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.

### Leader for Life Solutions

[In this issue:](#)

- A second group of inforce IUL policies will have access to additional indexed accounts
- Updates to level term letters for clients enrolled in EFT
- Expanding customer service capacity to better serve you
- Action required for Lincoln DesignIt desktop users

## Mutual / United of Omaha

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### The Closing Concept

#### Unleashing Opportunities Through Business Evaluations

Turn assumptions into clarity and conversations into funded continuity.

Business succession, buy-sell funding and continuity planning can feel complex and overwhelming. This concept shows how leading with an [informal business valuation](#) can help provide clarity and allow for deeper planning to unfold.

This Closing Concept is especially effective for:

- Clients with existing [buy-sell agreements](#)
- Long time clients whose businesses have grown
- Business owners who believe "we already took care of that"

Watch the [video](#). Download the [concept](#).

### Express

[In this issue:](#)

- Don't let Signatures Slow you Down
- Term Life Answers Conversion Updates effective May 1
- New Producer Resource: LTC Claims Value Overview
- Make the Most of SPA for Your Social Media Strategy
- Where Critical Advantage Fits in a Client's Financial Plan
- Positioning Critical Illness Coverage with Confidence
- A Fixed Index Annuity Built for Today: Backed for Tomorrow

## Nationwide

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### 8% Enhanced DCA rate — currently the highest in the IUL industry

Along with offering death benefit protection, the new Nationwide Indexed UL Accumulator III helps to give your clients more control over their growth potential with their 8% Initial Premium Enhanced DCA program:

- This may help lower their risk of investing at a high point
- Use it for some or all of their initial premium, including 1035 exchanges

[Download the Dollar Cost Averaging Guide.](#)

### CareMatters Annuity launching in South Carolina

Effective May 11, 2026, CareMatters Annuity will be available in South Carolina.

[CareMatters Annuity](#) is Nationwide's latest cash indemnity long-term care (LTC) solution; and is already active in Compact states and includes the following features:

- Simple application with just 6 underwriting questions
- LTC benefit is triple or double contract value
- Interest rate guaranteed for life of contract
- Joint coverage option to help protect 2 lives

## OneAmerica

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### Care Solutions News

[In this issue:](#)

- Why LTC planning strengthens practice value
- Reimbursement or indemnity: How long-term care benefits are paid
- On demand: Long-Term Care Market Outlook webinar
- 2026 illustration certifications
- Interest rates

## Pacific Life - Lynchburg

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### Field News Monthly

[In this issue:](#)

- Pacific Life's Year in Review
- Pacific Life Ranked #1 in Partner Satisfaction
- PL Promise Term Reprice
- Life Insurance for Blended Families
- Make Policy Access Simple

## Protective Life

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Lower prices for Protective Classic Choice term – [Get details.](#)

## Prudential Financial

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### May Sales Strategy: The Extended Care Conversation

The [May sales kit](#) includes:

- A new 2 min. video: shows how the BenefitAccess Rider helps empower clients to protect their financial legacy.
- An on-demand webinar (less than 10-min.) featuring Momentum IUL with BenefitAccess Rider.
- A new article: Rethinking Life Insurance as a Living Asset: Learn why life insurance deserves a place in clients' investment portfolios.

# Securian Financial

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## Making the most of annual policy reviews

- The right questions lead to meaningful conversations – Download the [client questionnaire](#).
- A three-step approach to effective policy reviews – See the [three-step guide](#).
- The power of a policy review brought to life – Watch the [webinar recording](#).

## SecureCare IV now available in DE, IN, ND and SC

SecureCare IV is Securian's newest long-term care (LTC) and whole life insurance policy. With this release, SecureCare IV is now available in all states except California, Montana and New York. [Discover SecureCare IV sales tools](#).

## Stronger accumulation starts with better design

Updated Income Protection Flex Agreement (IPA Flex) and Income Protection Agreement (IPA) rates are increasing income potential, with average max distributions now up to 11 percent higher on average compared to policies without. The lift is even stronger for some key segments.

This gives you a timely reason to rethink how you design life insurance policies for accumulation and income.

[In this article](#), Securian broke down what they changed and where it matters most.

## BOLD solutions for business owners

[Business Owner Life-stage Design \(BOLD\)](#) is a ready-made marketing program for financial professionals to use with business-owner clients.

BOLD helps you guide business owners to the right solution for their current business life stage. Whether they're fully operational, focused on attracting and retaining key talent, or planning for retirement, BOLD has a solution.

# Symetra

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## Symetra's IUL index crediting method makes a difference

Symetra index credits are based on beginning segment values, not the average or ending segment values. That can make a big difference over time, producing:

- Higher segment balances
- Greater index credits
- Stronger long-term performance

In fact, this little difference can translate into tens of thousands of dollars for your clients. [See how it works](#).

## Sales Flash

[In this issue:](#)

- Webinar replay: Mastering the Mechanics of IUL
- Swift producer validation enhancement
- Your one-stop shop for term
- Open the door to future possibilities with SwiftTerm's Conversion Enhancement Rider
- Private split-dollar arrangements: An efficient way to transfer family wealth
- New on-demand videos to level up your illustration skills
- Sue Bird brings life insurance into the spotlight