



May 6, 2025

American National

Strategy Index Annuity 7 offers a 10% Premium Bonus on all premiums in first 7 years

[Download the client flyer.](#)

Palladium MYG 6 – [See its' power.](#)

Annuity Watch

In [this issue](#):

- Prioritizing Retirement Planning
- Newly Designed Case Studies Brochure
- Strategy Index 10 Updates Live 4/5 in ID
- ID FPIA Form Update

Athene

Performance Elite Strategy Preset Deep Dive

- Watch the [webinar recording](#)
- Performance Elite Strategy Preset [Brochure](#)
- Performance Elite Strategy Preset [Case Study](#)
- [Demonstrating the value of Strategy Preset in strong equity markets](#)

Corebridge Financial (American General)

Improved rates on Select-a-Term – [Get details.](#)

Fewer requirements = faster decisions

Corebridge underwriting program uses a proprietary blend of automation and data sources to learn about your clients and reach fast decisions.

Did you know? Their APS order rate is less than 10%, with some partners achieving as low as 1.3%.

That means fewer requirements so your case can get on a faster track to a decision. [Learn more.](#)

Annuity Updates

In [this issue](#):

- Help capture the market's upside while eliminating downside risk
- The Elite Producer Compensation Program (EPCP) has been extended through 2025!
- Updated Advanced Marketing resources
- AML guidelines have been updated

Integrity Life

Show and Sell: Indextra & Indextra NY videos make marketing easier

Fixed indexed annuities (FIAs) can be hard to explain. But a video showcases the benefits more easily.

- [Indextra video](#)
- [Indextra NY video](#)

Advisor Ideas - [Read this issue.](#)

MultiVantage SPDA: 3% minimum, full renewal comp to age 96, no new paperwork

[Learn more.](#)

John Hancock

LifeCare – new hybrid indexed universal life (IUL) product with long-term care (LTC) benefits

[Explore it here.](#)

LTC in-force rate action notifications for May

[Get details.](#)

Spotlight

In [this issue](#):

- New research debunks common myths about guarantees — and reveals what clients really want
- Check out the latest LifeCare resources
- Celebrating 10 years of John Hancock Vitality with proven savings

Legal & General America (Banner and William Penn)

New financial underwriting updates

- **More progressive key person multipliers** (up to 20x), increasing flexibility in evaluating coverage for entrepreneurs and startups.
- **Reduced need for co-signers**, making approvals easier for business owners.
- **Shortened business term requirements** to align better with SBA loan collateral assignments.
- **Doubled retention limits**, providing underwriters more discretion to approve larger policies
- **Raised accelerated underwriting (AUW) limits** from \$2M to \$4M, freeing up underwriters to focus on complex cases rather than transactional term business.

[See the new underwriting field guide.](#)

Business Owners Life Insurance Guide

Banner Life/William Penn is in the market for business-owned life insurance. [See their guide!](#)

Lincoln Financial Group

Weekly Market Intel

[See the latest insights.](#)

Help clients go from “paying” to “planning”

Was it a rough tax season for some of your clients? If so, they might be suffering from a “tax hangover.” The good news is that you can help them plan ahead for next year by connecting them to tax-advantaged, performance-driven strategies – like cash value life insurance. Adding properly designed cash value life insurance to your clients’ portfolios can help clients keep more of what they earn and provides:

- An income tax-free death benefit for their beneficiaries
- Tax-deferred growth opportunities
- An income tax-free financial resource for retirement
- No penalties for cash values taken before age 59 ½

View Lincoln’s [tax planning client guide](#). Share this [tax-efficiency worksheet](#).

Find positive results...even in down markets

Positive results — even in negative markets — and 100% protection. What does this offer clients?

Historically speaking, they could have grown their savings 9 out of the past 10 years - even though only 7 years were positive.

Take a closer look at [Lincoln’s 1 Year S&P 500 Dual Trigger account](#) on a Lincoln fixed indexed annuity – offering clients predictability, simplicity, and more confidence in their retirement savings.

Lincoln has solutions for your clients with diabetes

Did you know 38 million U.S. adults have diabetes, and 1 in 5 don’t even know they have it?

In Lincoln’s “[Ask the Doctor](#)” audio series, Lincoln’s Chief Medical Director addresses this growing health concern and reveals how it impacts your clients’ insurance options.

New tool to create, customize, and compare Lincoln IUL indexed accounts

Take the guesswork out of indexed account selections. Lincoln’s new [Indexed Account Analyzer tool for WealthBuilder IUL](#) lets you explore custom and sample model allocations based on your clients’ risk tolerance. Backed by historical index data, this tool helps you make informed, data-driven decisions when building IUL strategies.

MassMutual

Disability for Engineers – [See the case study.](#)

MMSD Underwriting

In [this issue](#):

- Introducing MassExpress
- Life Webinar Summary: Crohn's & Ulcerative Colitis
- Case Clinic: Major Depression & Anxiety

Mutual / United of Omaha

Express Newsletters

In [this issue](#):

- Children's Whole Life
- Inforce LTCi rate adjustments
- Stacking traditional and asset-based LTC policies
- CI Case Study: Coverage for a Non-Working Spouse

In [this issue](#):

- 4 Quarters Club: Second chance to earn
- Navigating GI Disorders in LTC Underwriting
- Inforce LTCi Rate Adjustments effective July 1, 2025
- The Peace of Mind You Need: Critical Illness Insurance with a Built-in Return of Premium Rider

Pacific Life - Lynchburg

Field News Monthly

In [this issue](#):

- NEW Underwriting Guide
- How to Soft Sell Life Insurance and Why It Works
- Build stronger relationships with female clients
- Find out how you can use PL Promise Conversion UL to meet clients' changing needs
- Extended Coverage for Multilingual Clients

Prudential Financial

Start critical conversations with clients about longevity

Start critical conversations with clients about planning for living longer and the potential financial impact of a chronic or terminal illness. Show them what options are available to help them navigate chronic illness, and how the BenefitAccess Rider can help with financial protection. [Visit the sales concept page.](#)

Securian Financial

Life insurance multi-tool

Elevate your clients' overall financial strategies. 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.

Take a fresh look at Accumulator Ascent IUL -
now with more index strategies for greater diversification

[Symetra Accumulator Ascent IUL](#) is competitive indexed universal life insurance offering strong cash value accumulation potential and low policy charges. And, it's now available with two more well-known index strategies to choose from!

Key features:

- Multiple index strategies, including the S&P 500 Index with Bonus and Nasdaq-100 Index with Bonus.
- Flexible, tax-free access to policy cash value when clients need it through withdrawals and loans.
- A suite of optional riders including:
 - Chronic Care Advantage
 - Cancer Care Compass rider package
 - Charitable Giving Benefit