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Bi-Weekly Newsletter

January 13, 2026

American National

Annuity Watch Newsletters

In this issue:

- Building Wealth with Confidence
- Marketing Made Easy!
- Annuity Solutions for 2026

In this issue:

- 2026 Contribution Limits
- Track Best Entry Window Values Easily
- Fast-Track to Compounding Potential

Assurity

Annual Compliance Announcement – [Read it here.](#)

Mutual / United of Omaha

Should Wealthy Clients Self-Fund Long Term Care?

Read this piece on "[Why Transfer the Risk](#)".

Express Newsletters

In this issue:

- Sales Idea: Help Grandparents Give the Gift of Life Insurance Protection
- Why LTC Costs Are Rising - And How Smart Planning Preserves Peace of Mind
- Understanding the Critical Advantage Portfolio: What You Need to Know
- Protect Your Finances with Critical Advantage Insurance

In this issue:

- Start the Year Right With the Living Promise Record Keeper
- New Year Conversations That Matter: Introducing Long-Term Care Early
- New Year, New Plan: Why Long-Term Care Belongs on Every Client's 2026 Checklist
- Hope for the Best, Plan for the Unexpected in the New Year
- A Fresh Start for Financial Wellness: Planning for Critical Illness in the New Year

Bridging the gap: Helping clients prepare for health care costs in retirement

Rising health care costs threaten retirement security, leaving many Americans aware but inactive. Financial professionals can bridge this gap through education, Medicare guidance, and personalized planning tools to help clients manage expenses and reduce stress for long-term financial confidence. [Read more.](#)

Maximizing retirement income through tax efficiency

Tax-efficient retirement planning focuses on strategies to maximize after-tax income, extend portfolio longevity, and preserve estate value by optimizing savings and withdrawal decisions for long-term financial security. [Read more.](#)

North American Annuity

See why agents are raving about this client-ready tool

Helping clients "renovate" their financial home can feel like a challenge, but with the right resource, it can be simpler than ever. Just ask Jonathan K. from Florida, who shared how the [North American Financial Home Makeover](#) can help you identify gaps, build trust, and start the right conversations with clients about preparing for retirement. [Watch the video.](#)

And, [in the latest episode of Annuity Chat](#), North American shares how Sales and Marketing are partnering like never before to deliver more value to you and your clients, including:

- The power of Sales and Marketing alignment
- Client-approved materials that make an impact
- How they're raising the bar with the Financial Home Makeover

Protective Life

Closing of Indexed Choice UL

In early 2026, Protective Indexed Choice UL will close to new sales. [See the transition guidelines.](#)

Prudential Financial

Life Essentials

In this issue:

- January 15 webinar: The Retirement Climb
- Trimester sales strategies: Push to the finish
- 2025 Year-End Important Dates & Reminders
- Webinar recordings available

Securian Financial

Discontinuation of NY Replacement Business

Effective January 24, 2026, Securian will no longer accept life or annuity replacement business in New York. This applies to both external and internal life and annuity replacements. Transition rules are:

- Applications must be received in good order by January 23, 2026.
- Pending applications received on or before this date will be processed to completion.
- Applications received on or after January 24, 2026, will not be accepted.

This change impacts replacement transactions only. Securian Financial remains fully committed to supporting and servicing our existing and future New York business.