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July 28, 2026

American National

Annuity Watch

In this issue:

- Enhanced Smart Start Accumulator Series is now live
- The all-American five by five
- Unlock your potential. Earn more.
- New digital rate page
- Service center update
- Qualifying for 2027 Partner Conference

Athene

Accelerate

In this issue:

- A mid-year review checklist helps you connect with clients
- How to help put your clients at ease — and why it matters
- Indexed annuities and mutual funds: What's the difference?
- Revisiting your retirement plans
- Sneaky expenses that can wreck your budget
- July 28th webinar: Helping Clients Through Life's Toughest Financial Conversations

Banner Life / William Penn

Banner Life Insurance Company is #1

It's official – Banner Life Insurance Company is #1 for term life insurance in the U.S. according to LIMRA 2026 Q1 sales data.

Corebridge Financial (American General)

Don't let your customers' term premiums go to waste: See the power of permanent life insurance coverage

Why convert? Term coverage disappears if a client outlives the policy. Help them trade uncertainty for permanent protection by converting.

- Extend guaranteed protection
- Transitions a temporary cost into a cash-value asset
- A 100% cash out opportunity at years 20 and 25

For more conversion resources, visit the "Term-to-Perm Pivot" page. View the case study. See the FAQ's.

Help clients diversify with more index choices

Max Accumulator+ III now offers an expanded lineup of index interest crediting strategies1, giving you more flexibility to help clients diversify cash value allocations. What's new:

- Nasdaq-100 Cap Index
- S&P 500 High Bonus Index

Explore the Diversification Brochure to learn how diversification can help clients pursue opportunities across changing market environments.

Lincoln Financial Group

Q3 2026 Market Intel Exchange – Download it here.

Smooth Sailing for Roth IRA Conversions

Lincoln's streamlined Roth IRA conversion process through their fixed indexed annuities makes conversions easier, faster, and more flexible, so you can spend less time on administrative tasks and more time helping clients reach their financial goals. Share the client flyer.

Life in Focus

In this issue:

- Podcast: unlock meaningful opportunities by taking conversations beyond the 401(k)
- Take advantage of Conversations That Close
- Are your clients renters or owners? Term life can be a great fit.
- Explore opportunities with premium financing
- Focus on going global

MassMutual

Expanded GI Rate Class unlocks larger business-owner opportunities

Effective July 15th, the GI Rate Class will expand to unlimited covered lives for employer-paid plans across qualified and non-qualified markets.

This change supports larger, more complex business-owner opportunities across employer- and employee-owned structures, helping owners retain and reward key employees with whole life solutions and fewer barriers. It also helps address small-business needs for tailored financial strategies, including non-qualified deferred compensation, split dollar life insurance, Section 162 bonus plans, and life insurance in certain qualified profit-sharing plans.

- Download the GI Rate Class Pre-Sale Questionnaire
- Explore the GI Rate Class Guide
- View the Business Profile Snapshot

New UL Guard and SUL Guard launching in New York – Get details and resources.

Mutual / United of Omaha

The Closing Concept:
Turning Premium Finance Into a Multifaceted Solution

Premium finance can unlock opportunities that may require an approach beyond traditional funding. In this case, a high-net-worth client with more than $200 million in assets needed to create liquidity in his estate planning. Instead of selling assets, the advisor used premium financing to fund a $50 million indexed universal life insurance policy designed to support family security, business continuity and generational wealth transfer.

Watch the video and read the case study to see how this strategy worked and how to bring it into your next complex case discussion.

Express

In this issue:

- Simplify Final Expense with Living Promise
- The Mutual of Omaha Difference
- Customizable HIP Plans
- July 21 Webinar: What the dedicated government affairs team is doing on Capitol Hill
- Med Supp Rate Adjustments

Nationwide

Help customize clients' retirement income

Nationwide's INCOME Promise Select Quick Estimator helps illustrate customized guaranteed retirement income options, including lifetime or period-certain payouts, COLA and liquidity features, enabling more informed client conversations around income planning and financial security.

Helping RIAs and FPs maintain momentum

Nationwide can help transitioning FPs and registered investment advisors (RIAs) navigate firm changes with resources and support designed to maintain business continuity, strengthen client relationships, and facilitate a smoother, more successful transition. Learn more.

North American Annuity

Turn Roth conversions into tax-free lifetime income potential

Roth conversions continue to be a powerful planning conversation, especially for clients looking to manage taxes, diversify retirement income, and create tax-free income potential in retirement.
This new client friendly flyer shows how a partial Roth conversion strategy using Income Pay Pro FIA can help clients build tax-free, guaranteed lifetime income[1] potential.

Pacific Life - Lynchburg

Pacific Life Upcoming Security Enhancement for Life Financial Professional Websites

Get details.

Protective Life

Classic Choice term offers future flexibility

Clients can convert to a permanent solution and get chronic illness protection — no additional underwriting or exams required — with the Conversion Choice rider with ExtendCare. See how one client's short-term need turned into a long-term opportunity, despite future health concerns.

Prudential Financial

Help business owners protect what they've built

The July Trimester page offers tools and resources to help you start conversations with business owners around income protection, key person coverage, talent retention, and succession planning.

Life Essentials

In this issue:

- Sales Strategy – Business Planning LifeCycle
- Retirement of Term Essential—important update
- Accelerate the underwriting experience for clients
- Stronger security coming for PruSign
- Access your Hartford/Talcott Agent Statements online
- EssentialTerm Suite: Important planned enhancements for new business submission

Securian Financial

Up to 40% lower charges. More client value.

In Indexed Universal Life (IUL), charges matter. Eclipse Accumulator II IUL delivers the lowest total charges by year 20 among major competitors,1 helping more premium dollars go to work for your clients from day one. Learn more.

Symetra

July is Chronic Disease Month

It's a powerful time to talk to your clients about protecting themselves financially from the unexpected costs of a chronic illness.

Research shows:

- 75% of U.S. adults have one chronic disease.
- 50% have two or more.
- Chronic diseases account for 70% of the top 10 causes of death.
- They account for 90% of the $5.3 trillion in U.S. health care spending.

Fortunately, life insurance policies with chronic illness riders can help.

- Chronic illness riders provide access to the policy death benefit while the insured is still alive.
- Rider payments may be used for any reason—to cover medical bills and caregiving, replace income, pay for home modifications and long-term care, and more.

See how Symetra's Chronic Care Advantage Rider can help.