

Weekly News

January 21, 2026

American National



[In this issue](#) of **Annuity Watch**:

- 2026 Contribution Limits
- Boost Your Clients' Financial Potential
- Marketing Made Easy!
- See the Latest Strategy Index 7 & 10 Crediting Strategies Approved in California
- Get the Details on the Strategy Index 7 Premium Enhancement Update
- Unveiling the Invisible Generation – Life & Annuity Solutions for Gen X

Athene



[In this issue](#) of **Accelerate**:

- Help your clients create a budget in 5 steps
- The upcoming retirement boom: Are your clients financially prepared?
- How fixed indexed annuities can help take the sting out of health care costs
- Are your clients ready to retire?
- 6 ways to improve financial literacy

Corebridge Financial (American General)

Create guaranteed income clients can't outlive

Help clients turn IUL cash value into an income stream with the [Max Accumulator+](#) and [Income for Life](#) rider:

- Retain guaranteed income in volatile markets
- Experience market-linked "step-up" feature
- Offset cost of living increases

Power Series of Index Annuities enhancements – [Get details.](#)

John Hancock

Discover John Hancock's updated IUL solutions

- **Enhanced Accumulation IUL featuring SmartStart segments**

Your IUL sales edge begins with [SmartStart Segments](#), a policy-management feature now available exclusively on these updated IUL offerings, delivering seamless segment alignment and greater transparency with:

- Immediate allocation: On non-backdated policies, segments begin on the date initial premium is paid for
- Aligned policy reviews: First segment maturity coincides with the first annual statement, simplifying policy reviews

- **Additional enhancements to Accumulation IUL**

The new [Accumulation IUL](#) delivers improved cash value accumulation and income potential, with more flexible early cash value options and a new S&P-linked Fixed Index loan.

How Vitality is driving healthspan improvement

[This latest episode of the Longer. Healthier. Better. Podcast](#) discusses Vitality's approach to improving healthspan through strategic partnerships and incentives.

Lincoln Financial Group

Roth IRA conversions made simple with Lincoln

Lincoln has streamlined the Roth IRA conversion process using Lincoln OptiBlend fixed indexed annuity, with these five advantages, eliminating the barriers when clients convert their traditional IRA or 401(k) plans:

1. Only one application required with a simple "checkbox." This means clients don't have to fill out two or more applications.
2. Clients will only have two contracts — the Traditional IRA and the Roth IRA — which come out of surrender on the same day.
3. Flexibility for future conversions. Clients can convert as much or as little to the Roth IRA whenever they want, with no need for a new application or contract.
4. Lincoln can facilitate tax withholding on the conversions.
5. Clients unsure today can still open a Roth in future years (with a new application)

Help clients take advantage of the benefits of converting to a Roth IRA with Lincoln's simplified process. [Share this client flyer](#) with them.



[In this issue of Life in Focus:](#)

- Offer clients convenience this tax season
- Committed to Term for Life
- Top 5 advanced planning opportunities for 2026
- See what's shaping the market now
- Now available in California! Lincoln WealthBuilder ECV IUL

Dividends Explained

The [Dividends Explained](#) website is designed to educate and support client conversations about dividends — what they are, how they can be used, and why they matter. It also includes a case study demonstrating dividends in action.

Mutual / United of Omaha

The Closing Concept – *NEW!*

Twice a month, “The Closing Concept” will provide an opportunity, a product solution and the exact reason why Mutual of Omaha is the partner you need to get these deals across the finish line.

In this first issue, learn **Why January is the Non-Negotiable Window for Client Reviews.**

- [Watch the video.](#)
- [Download the strategy.](#)
- Download the [Living Life to the Fullest: Income Advantage IUL Flyer.](#)
- Download the [Professional Advantage Brochure.](#)
- January is also a good time for clients to review and update [beneficiary designations](#) on their policies.

Mutual Holding Company Notification

In mid January, approximately 1.6 million Mutual of Omaha policyholders will receive an annual meeting notice and proxy statement that includes information about our reorganization as a Mutual Holding Company. The mailing will direct policyholders to a website with additional details and our Plan of Reorganization. [Read the announcement.](#)



[In this issue](#) of Express:

- Kick off 2026 with IULs You Can Trust
- Long-Term Care Processing and Servicing Updates
- Agent Tax Guide Update: New Long-Term Care Insurance Information Added
- Understanding the Critical Advantage Portfolio: What You Need to Know
- Deliver More Value with Critical Advantage
- Yearly 1099s are available online

North American Annuity

Help clients get organized for 2026

The new year is when many clients feel motivated to get their financial lives in order and you can help make that process simple.

The **Family Document Locator** and **What to Keep, What to Shred flyer** are two of the most popular tools inside the [Financial Home Makeover magazine and website](#), helping give clients clarity, confidence, and a strong foundation for everything else they plan to tackle.

Guarantee Plus MYGA – [See the rates](#) effective January 15th.

Fixed Indexed Annuities – [See the rates](#) effective January 15th.

OneAmerica

Enhanced Asset Care - *coming soon*

Asset Care will be available for CT and DC on January 26th. And also starting January 26th, Flex for Asset Care will be available in CT, DC, FL and NJ for all business submitted electronically. [Get complete details and access resources.](#)

Protective Life

PL Promise Term Life Insurance Reprice – [Get details.](#)

Prudential Financial

2026 Trimester Program – your January Sales Theme

Start 2026 strong! Prudential's [January Trimester page](#) is packed with tools and insights to help you guide clients in building a holistic retirement strategy as they work to achieve retirement readiness.

Here's what you'll find:

- A new case study shows how you can help clients leverage life insurance for better retirement outcomes.
- The 2025 Global Retirement Pulse Survey highlights ways you can help affluent clients boost confidence in their retirement readiness.
- The Life & Longevity Podcast features bold conversations on caregiving, retirement readiness, and client behavior.



[In this issue of Life Essentials:](#)

- Survivorship Index UL: protecting and growing clients' legacies
- Trimester Sales Strategies: Retirement Readiness
- Introducing Just Ask GenAI chatbot on PruXpress
- Unlocking the living benefits of life insurance
- EssentialTerm Suite now available in South Carolina
- 10-minute Mondays for 2026
- The 2026 Easy Reference Tax Guide
- Xpress Worksheet update for EssentialTerm Suite in SC
- 2025 Tax Forms for policyowners are available online

Securian Financial

SecureCare IV - *coming soon*

Built on what works, enhanced where it counts!

With SecureCare IV, Securian's newest long-term care (LTC) and nonparticipating whole life insurance policy, they didn't start over to stand out. They built on the SecureCare you know, enhancing it with industry-leading early claim support¹ and new flexibility to strengthen every client conversation.

SecureCare IV launches January 26th in all states except CA, CT, DE, IN, MT, ND, NJ, NY, SC, and SD.

[Explore what you can expect and see the transition rules.](#)

Western & Southern Financial (Integrity Life)

Fixed annuities – [See the rates](#) effective January 1st.

Indextra series – [See the rates](#) effective January 15th.

Indextra New York – [See the rates](#) effective January 15th.

JourneyMark FIA – [See the rates](#) effective January 15th.

United Underwriters, Inc. 3 Holland Way, PO Box 1103, Exeter, NH 03833

(p) 603-778-0555 (f) 603-778-7918 uui@uuinc.com www.uuinc.com

Please note: UUI does not offer variable products.