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Weekly News

July 22, 2026

American National

In this issue of **Annuity Watch**:

- 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

In this issue of **Accelerate**:

- 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)

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

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.

In this issue of **Life in Focus**:

- 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.

In this issue of **Express**:

- 10% Commission Bonus on eligible products
- Help Your Clients Protect the Home and Lifestyle They've Worked Hard to Build with Term Life Express
- Plans N and G at a Glance
- Earn More on Every HIP Sale
- E-Application Signature Methods
- Med Supp Rate Adjustments
- LTC Insurance is Not One-Size-Fits All
- LTC - Why Inflation Protection Matters
- Critical Illness - The Missing Piece in Financial Protection
- Younger Investors Are Turning to Annuities

North American Annuity

A popular client resource you can now share in Spanish

The Spanish-language Balanced Accumulation brochure can help your agents support discussions around:

- Balancing growth potential and protection
- Managing market volatility while maintaining upside potential
- Exploring how a fixed index annuity may complement a broader retirement strategy
- Preparing for retirement with confidence and long-term financial security

Up to 31%: Their highest Charter Plus premium bonus ever

North American Charter Plus fixed index annuity (FIA) now offers the highest premium bonus ever available for this product, giving clients even more accumulation potential from day one. Explore bonus opportunities.

Pacific Life - Lynchburg

Updated Split Dollar Endorsement Form – Download the new form.

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.

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.