

ANNUITY WATCH

Discover the Power of a Smart Start

When it comes to long-term accumulation, how you begin is just as important as how you finish. With the Smart Start Accumulator Series, your clients gain access to powerful features from day one—features designed to create a multiplier effect that can meaningfully enhance long-term accumulation outcomes.

[Discover more](#)



Uncover Client Needs with Ease

Our Client Factfinder can help you uncover essential client information, providing a comprehensive view of their financial circumstances. Easily identify key details about your clients' needs, goals, and challenges. This deeper understanding allows you to offer more personalized and effective financial advice, ensuring that you can better serve clients.

[Get started](#)

Confidential Client Information

What Concerns You Most?

Please indicate the primary concern(s) that you or your client(s) are most concerned about. Check all that apply.

☐ Retirement Savings ☐ Health Insurance ☐ Life Insurance ☐ Disability Insurance ☐ Long-Term Care Insurance ☐ Education Savings ☐ Other (Specify): _____

Personal Information

Client Name	Relationship	Age	Gender	Marital Status	Occupation	Income	Assets	Liabilities	Other
John Doe	Spouse	45	Male	Married	Software Engineer	\$120,000	\$500,000	\$200,000	None
Jane Doe	Spouse	42	Female	Married	Marketing Manager	\$80,000	\$300,000	\$150,000	None

Client Signature: _____ Date: _____
Advisor Signature: _____ Date: _____

California Form Updates for Strategy Index 7 & 10

California has recently approved new crediting strategies for Strategy Index 7 & 10 which will introduce some form changes. These updates include additional strategy options, including one with a higher cap, along with a new allocation feature designed to simplify decision-making for those who prefer a more guided approach.



[Read further details](#)

A banner with a yellow background. On the left is a portrait of a smiling woman with dark hair. To her right, the text "Empowering Future Generations" is written in large, bold, dark blue letters. Below this, in smaller dark blue letters, is "Annuity Solutions for Millennials & Gen Z". In the bottom right corner, there is an orange button with the text "LEARN MORE" in white capital letters.

Empowering Future Generations

Annuity Solutions
for Millennials & Gen Z

LEARN MORE

Policy Form Series: FIA25; FPIA24

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