

ANNUITY WATCH



Track Best Entry Window Values Easily

Policy Inquiry will soon be enhanced to give you and your clients a clearer insight into Smart Start Accumulator policies, specifically the Best Entry Window feature. The update will display Best Entry Window values, including the initial policy value as well as the 90-day Best Entry value.

[Get the details](#)

Fast Facts on IRAs

Our new Individual Retirement Account (IRA) FAQ provides quick, clear answers to the most common retirement account questions. From contribution rules and tax benefits to rollover strategies, this resource helps you guide clients toward smarter financial decisions while bringing clarity to the conversations that matter most.

[Discover more](#)



New Year, New Retirement Goals

The new year is the perfect time to help clients reevaluate their retirement plans.

Our Setting Retirement Goals leaflet provides a practical tool to guide discussions around realistic goal setting and savings strategies. Use it to simplify complex topics, spark meaningful conversations, and ensure your clients feel confident about the future.



[Start the conversation](#)

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Policy Form Series: FIA25

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