In the news

In your corner: Meet the Advanced Markets team

This month, we're showcasing the professionals who support your business and help you navigate complex planning conversations with greater confidence. Whether you're exploring estate planning strategies, business opportunities, charitable planning, or wealth transfer concepts, our Advanced Markets team is here to help.

We're also pleased to welcome Thomas Robb, JD, CFP®, who recently joined as Associate Counsel and brings decades of experience.

From case consultations and design insights to educational resources, including tools and calculators, we can help you bring meaningful solutions to your clients.

Life Insurance Awareness Month is almost here

Every September is dedicated to raising awareness of the value and importance of life insurance. It also serves as a timely reminder to review existing policies and ownership arrangements to help confirm they continue to align with your clients' goals. Take a closer look:

- Are your clients' life insurance policies keeping up?
- Trust-owned life insurance (TOLI): Considerations for ongoing oversight

Additional resources **John Hancock SalesHub**

John Hancock Advanced Markets

Key insights from Advanced Markets

Central Intelligence

Stay informed on important court rulings and legislative updates that can affect our industry. Each month, this publication summarizes topics that can directly impact your business. This issue includes:

- South Dakota Supreme Court rejects estate's STOLI claim
- Treasury finalizes rules identifying certain CRAT designs as listed transactions
- IRS and Treasury issue final regulations regarding QDOTs
- FinCEN finalizes rule withdrawing CTA reporting requirements for most

Read the latest

In case you missed it

Taxes and legacy planning: Top resources to use today