

ANNUITY

QUARTERLY

Q3 2026

Your Quarterly Source for Annuity News and Resources

Welcome to the first issue of Annuity Quarterly, a new resource created to help you stay current on Mutual of Omaha annuities.

Each quarter, we'll bring together product updates, sales ideas and useful resources to help you prepare for client conversations and confidently position our annuity solutions.

In this issue, you can find a link to our [Annuity Hub](#), revisit resources from Annuity Awareness Month, and learn about an important enhancement to Ultra Advantage FIA®.

SALES RESOURCES

Keep the Confidence Going

Annuity Awareness Month may be over, but the conversations it started can continue throughout the year.

Our Annuity Awareness Month resources were created to help you explain the role annuities can play in retirement planning, respond to common concerns and guide clients toward solutions that support their goals.

Whether you followed the campaign or missed it the first time, these resources are a good place to start.

Explore Annuity Awareness Month Resources

PRODUCT NEWS

A New Way to Support Clients With Inherited Assets

Ultra Advantage FIA® can now accept inherited funds, including qualified and nonqualified assets.

This enhancement gives you another way to help beneficiaries navigate an important financial transition. Eligible inherited assets can be used to purchase an annuity offering principal protection and growth potential.

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For producers, that means:

- ✓ More flexibility when helping clients manage inherited assets
- ✓ Another option to consider during beneficiary conversations
- ✓ Additional opportunities to meet clients' changing financial needs

Review the frequently asked questions to learn more about eligible funding, distribution considerations and how the process works.

[View the Inherited Funds FAQ](#)

LOOKING AHEAD

More Annuity Insights Are Coming

Look for Annuity Quarterly at the end of each quarter for product news, current opportunities and resources you can use in your business.

Until then, keep the confidence going by exploring the tools and information available from Mutual of Omaha.

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