



October 2026



Business Planning Resources

How can life insurance help your business owner clients achieve their financial planning goals? Use these resources to help spark conversations with these clients and uncover planning opportunities.

[View the Materials](#)

Life Insurance for the Blended Family

Blended families often face unique estate planning considerations. This resource can help support your conversations with clients that have children from a previous marriage.

[Get the Resource](#)


Is It Time for a Life Insurance Checkup?

Life changes fast, and planning needs might change along with it. Share this flyer to start checkup conversations and help clients evaluate how their coverage can adapt.

[Share Flyer](#)

Using Life Insurance to Support Charitable Goals

For clients passionate about giving, life insurance can be a flexible way to support a favorite charity. This piece can help you show clients what that might look like.

[Learn More](#)



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Insurance products and their guarantees, including optional benefits and any crediting rates, are backed by the financial strength and claims-paying ability of the issuing insurance company. Look to the strength of the insurance company with regard to such guarantees because these guarantees are not backed by the independent broker/dealers, insurance agencies, or their affiliates from which products are purchased. Neither these entities nor their representatives make any representation or assurance regarding the claims-paying ability of the issuing company.

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26-VER-106

MPF5635-BM-00

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