

Introducing Annuities to Your Clients

Annuities can be a pivotal component in the landscape of financial planning and retirement strategy. We have developed this curated collection of resources designed to equip financial professionals with educational tools to engage clients and optimize their portfolios with annuities.

While many annuities provide clients with tax-deferral and protection from market loss, the complexity of annuities often presents challenges in client education and decision-making. Our goal is to demystify these financial products and empower you with resources that educate your clients to make the best decisions for their retirement goals.

Check out the available resources below. By leveraging these value-add marketing resources, you can strengthen your advisory services, build deeper client relationships, and drive growth in your practice. We are committed to supporting your professional journey and helping you unlock the full potential of annuities for your clients.

[Read the Client Guide](#)

Related Value-Add Marketing Resources



An Introduction to Annuities seminar

A seminar advisors can give to clients providing a broad overview of what annuities are and how they work.

[Download the Presentation >](#)



An Introduction to Annuities brochure

This client-facing brochure provides an overview on annuities and how they can benefit clients in their retirement years.

[Download the Sales Idea >](#)



Sales Idea - Looking for a Less Taxing Way to Save for Retirement?

A handout for your clients on the differences between annuities and certificates of deposit. Includes information on how the two products combined can strengthen a portfolio.

[Download the Sales Idea >](#)



Sales Idea - Is Now the Time to Lock-in Higher Rates?

This client handout explains the benefits of purchasing annuities when interest rates are high.

[Download the Sales Idea >](#)

Shareable Content



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[Email Your Clients](#)

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