

Annuity Rescue

Unbiased, expert advice and access to the best products...all backed by our commitment to **service excellence.**



Why review your clients' annuities?

With the markets at all-time highs, there has never been a better time to review your clients' existing annuities. Protect your clients' gains while increasing their lifetime income and reducing portfolio costs with our help.

What can a review do for your clients?



Lock-in
Gains



Reduce Risk
Exposure



Reduce Fee
Drag



Create More
Guaranteed Income

What can a review do for you?

You will be able to ensure that your clients have the best product for their needs while replacing dead assets and re-monetizing your book of business.

Why partner with BSMG?

Whether it's product innovation or consultative selling advice, everything BSMG does for you is about making the complex simple. Our focus on personalized service and our intense knowledge of annuity products and retirement planning concepts help you present ideas to your clients with originality and precision.



STEP 1

Review your book of existing annuity business to determine if any contracts are out of surrender with policy values nearing income values.



STEP 2

Contact your annuity specialists at BSMG. Provide us with your client's most recent statement and completed Annuity Rescue fact finder.



STEP 3

Have a discussion with your client about locking in their gains, reducing fees and giving them the potential for more guaranteed lifetime income.