



February 2023

We are excited to share with you a **3-part series on Whole Life with Bobby Samuelson**. With the rise in interest rates and the increase in Whole Life sales, we felt it was the perfect time to share this powerful series. The information in this series will provide you with new insights in understanding the product, how it is used in the industry and the overall marketplace. The topics include:

- Review the Whole Life Marketplace today.
- Discuss the major sellers of Whole Life and the Career Agency populations from Whole Life companies.
- fundamentals on how does Whole Life work and what are the similarities to Universal Life designs?
- How did 7702 reform and revitalize the Whole Life market?
- What are the most popular sales designs?
- How do dividends work and why they are so sought after in today's market?
- What are the advantages of being a mutual policyholder?
- Why is Whole Life being used for large cases including as a 'stable platform' for premium financed cases?

We want to thank MassMutual and New York Life for collectively sponsoring this series. Please reach out to your sales team if you have any questions or would like to learn more about Whole Life.

Below is Bobby's bio



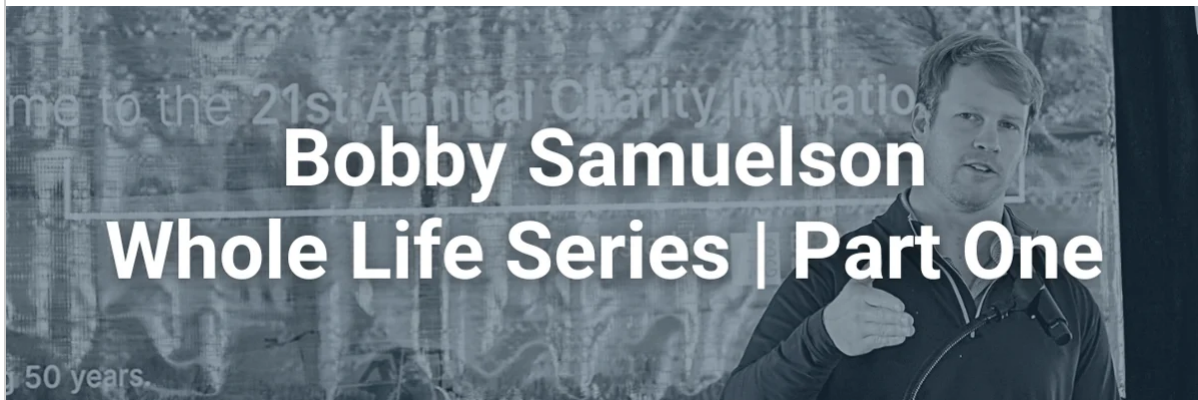
Bobby Samuelson

Bobby is the Executive Editor of The Life Product Review, the industry's best source for independent and objective life insurance product intelligence. He is also the President of Life Innovators, an independent product development firm helping life insurers create, implement and distribute unique and differentiated life insurance and annuity products.

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Bobby Samuelson Whole Life Series | Part Two

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Bobby Samuelson Whole Life Series | Part Two

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Bobby Samuelson Whole Life Series | Part Three

Sincerely,

The BSMG Team

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