

Maximize Your Investments with Index Annuities

This month, we're diving into the exciting benefits of Index Annuities!



Picture this: a financial tool that helps secure the best return rate while shielding your clients from the rollercoaster ride of market volatility. That's the power of an index annuity – an opportunity that offers financial stability during prime retirement years.

The case studies below showcase two client scenarios where



Accumulation Case Study

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CLIENT PROFILE:

- **Name:** Mr. Smith
- **Age:** 60
- **Financial Goal:** Preserve and grow wealth with minimal risk over a 5-year period
- **Risk Tolerance:** Low

CLIENT'S OBJECTIVE:

Mr. Smith expressed a want for a fixed 5-year MYGA. His primary concern was to secure the highest rate of return possible while avoiding exposure to market volatility. He expressed a need for financial stability and peace of mind during his retirement years.

ADVISOR'S INQUIRY

Our advisor proactively gain a deeper understand and expectations. The key "Why are you specifically MYGA, and what are you

CLIENT'S RESPONSE

Mr. Smith highlighted his the highest return possible about potential market c savings and sought reass would be shielded from i



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Guaranteed Income Case Study

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BENEFIT?**


A 60-year-old married couple is looking to supplement their retirement income at age 65. By using a fixed indexed annuity with an income rider, the couple commits \$1,000,000 in premium with a five-year income deferral period to create a guaranteed income stream of \$96,000 or more per year for the rest of their lives. The approach capitalizes on today's rates and minimizes market and longevity risk.

Here's how...

GUARANTEED INCO

Income riders provide a income stream that you i
(SEE SEQUENCE OF RETURN IMPACT BR

- Even if your account entirely, you still rece
- All amounts are know at issue.



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**RECORD
ANNUITY
SALES**

Annuity Sales Set More Records in Q4, Break \$100B, Wink Reports

Wink, Inc. has just released its report on annuity sales for the fourth quarter, and the results are nothing short of extraordinary.

[Click Here for the Full Article](#)

It's worth noting that an indexed annuity can outperform a fixed annuity and secure the highest rate of return while minimizing exposure to market volatility.



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