

# Weekly News

December 23, 2020

## American General

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- **How to launch a grab-n-go campaign** – [Watch this 10-minute step-by-step demo.](#)
- **Early Cash Value Rider** – **NEW!** [Get the scoop.](#)
- **Share these new infographic videos with consumers**  
AIG has combined two of their most successful marketing tools together to bring their most impactful conversation starters to life.
  - Share the [retirement video](#)
  - Share the [healthcare statistics video](#)
  - Share the [long-term illness video](#)
- **New annuity products** – *coming January 4<sup>th</sup>*  
Introducing [Assured Edge Income Achiever](#) & [Assured Edge Income Builder – NY](#). Both offer a guaranteed living withdrawal benefit (GLWB), the opportunity to grow future lifetime income, maximize lifetime income with liquidity options and be assured their money is protected because there's no market participation.
- **AIG fixed annuities could benefit your clients with options for guaranteed income they can't outlive** – [Learn more.](#)
- **Enhanced annuity playbook for your business** – [Visit the playbook here.](#)
- **Guide clients through a review of their retirement income strategy from a tax perspective**  
[Use this helpful brochure.](#)
- **Revised NAIC suitability in annuity transactions for AZ & IA** – [Read the bulletin.](#)
- **Understanding the AIG suitability process and making suitability recommendations** – [View the guide.](#)

## American National

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- **New training requirements for Annuity sales** – [Get details.](#)

## Assurity

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- **Good Business Podcast** – **NEW!**  
Assurity is proud to announce the upcoming launch of their new podcast - [Assurity's Good Business](#); a look at how business leaders across the country are successfully using their work to make a positive impact. You won't want to miss the exciting guests they have lined up for their first episodes in January. [Listen to the teaser episode to learn more.](#)

## Integrity Life

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- Annual advertising notification – [Read it here.](#)
- Annual Florida churning notice – [Read it here.](#)
- Updated Suitability and Replacement Addendum forms – [Get complete details and download the new forms.](#)

## John Hancock

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- Long Term Care updates – [Read the bulletin.](#)

## Legal & General America (Banner and William Penn)

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- **The Ultimate Holiday Gift: Protect Your Loved Ones**  
This Holiday Season, help your clients find affordable options for protecting what matters most.
  - [Download the client-approved flyer](#)
  - [Download the NY version](#)

## Lincoln Financial

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- **Lincoln Leader for Fixed Annuities Newsletter**  
[Read the December 14<sup>th</sup> issue](#); including:
  - Use of electronic capabilities for conducting business with Lincoln
  - New training requirement for NAIC Annuity Transaction Model Regulation
  - Lincoln Deferred Income Solutions Annuity – QLAC status update

## Mutual / United of Omaha

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- Learn the Basics about Living Promise Whole Life – [Watch this product training video.](#)
- IUL historical performance is now available for IUL Express – [Learn more.](#)
- Boost your LTCi sales by furthering your product and sales process knowledge  
[Use this new Sales and Marketing Process Brochure.](#)
- The Life of an LTC Application - [Watch this quick tutorial to familiarize yourself with the steps of processing an LTCi application.](#)
- LTC rate adjustments
  - [Delaware](#) - effective March 1, 2021
  - [Maine](#) – effective April 1, 2021
- Protect your clients mortgage  
[Watch this video](#) to learn how disability income insurance can protect your clients' home, savings and lifestyle.
- Critical Illness policies are being e-mailed  
As we head into the 2021, don't forget that health product policyholders are receiving their policy output electronically. [Read more.](#)
- All Cancer & Heart Attack/Stroke term policies come with a term to lifetime conversion option – [Learn more.](#)
- The Critical Advantage Portfolio - [Products for multiple stages of your client's life.](#)

# OneAmerica

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- **Care Benefit Concierge – care coordination enhancement**  
OneAmerica is excited to announce the expansion of their program to include access to [care coordination services through CareScout](#). [Learn more.](#)
- **2021 e-Pocket Tax Tables** – [Download them here.](#)
- **Compliance notice for Arizona and Iowa** – [Read the bulletins.](#)
- **OneAmerica in the news**  
OneAmerica Vice President Steven Lynch was recently published in both Broker World and BenefitsPRO Magazine. Read [Professional Development As A Tool To Stay Connected](#) and [4 ways to simplify FMLA leave](#) for Steven's perspective on current topics in the benefits space.

## Pacific Life - Lynchburg

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- **Are Women Buying Enough Life Insurance?** [Read the article.](#)
- **A touch-free process for clients**  
Show clients a convenient alternative to today's life insurance buying experience. With Pacific Life, qualifying clients could get up to \$1 million in life insurance coverage with our no-touch, no-paper process. [Download this flyer to share with clients.](#)
- **Life changes fast! Keep up with a policy review.**  
Switched jobs? Moved? Expanded family? Many people don't realize how much their lives have changed until they stop to think about it. It's a great time for a Policy Review to make sure your clients' life insurance coverage meets their current needs. [Check out this handy worksheet you can use with them.](#)
- **Educate clients on how they can quickly access their policies, sign and pay electronically using eDelivery**  
[Share this flyer with them.](#)
- Quick links to Pacific Life client guides
  - [PL Promise Term](#)
  - [PL Promise GUL](#)
  - [PL Promise Conversion UL](#)
- **Alaska Disaster Relief Order** – [Read the bulletin.](#)
- **Sales Material Review Procedures** – [Read the bulletin.](#)

## Principal

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- **Expanded maximum issue limit program extended into 2021**  
[See how your higher-earning clients can get expanded issue limits.](#)
- **New underwriting guide available** - [Get the latest version with the recent occupation class updates.](#)

## Protective Life

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- **A guide through underwriting**  
This [Did You Know flyer](#) outlines Protective's medical and non-medical highlights - helping you navigate the underwriting process. Their team is ready and able to help with all types of cases – large or small, simple or complex.

- **Compliance Bulletin**  
[Read this bulletin](#) for important updates regarding Suitability for your annuity business and updates to the NAIC Suitability in Annuity Transactions Model Regulation. A few highlights are below.
  - AZ & IA requirements beginning January 1<sup>st</sup>
  - Updated Suitability form beginning February 1<sup>st</sup>
  - New requirement effective February 1<sup>st</sup> if client refuses to provide financial information or if the owner chooses to purchase a product without a recommendation from the agent
- **Annuity interest rates** – [View the latest rates.](#)

## SBLI

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- **Extended Upsell Program Opportunity** – *Time is running out!* – [Get details.](#)

## Securian Financial

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- **SecureCare - sales idea**  
Since SecureCare Universal Life's maximum payment age is now age 80 in most states, this allows older clients to take advantage of longer payment duration options and — potentially — a new premium funding strategy. If a client doesn't need to rely on required minimum distributions (RMDs) from their qualified accounts for retirement income, they could use their RMDs to fund SecureCare. If you have older clients who are late to the long-term care (LTC) planning game, then this is a sales idea you'll want in your repertoire! [View the flyer.](#)
- **Set family meetings!**  
Helping your clients navigate the family discussion is a great way to add value and also establish relationships with family members. [Use this guide to help you plan and execute your family meetings this season.](#)

## Symetra

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- **Discontinuation of guaranteed universal life product sales** – [Read the announcement.](#)