

# Advisory annuity analysis

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Your clients may have annuity contracts that no longer align with their financial goals and objectives. The modernization of annuity products provides opportunities to take advantage of features and benefits previously unavailable. Jackson's RIA consultants can provide a complimentary annuity analysis to ensure existing annuity contracts are consistent with the holistic financial plan and allow you to add value by advising on the underlying investments. The analysis will:

- Compare fees and expenses
- Review liquidity and applicable surrender charges
- Analyze any add-on living and death benefits\*
- Help you understand annuity costs compared with benefits it provides

## The importance of evaluating annuities as part of a financial plan

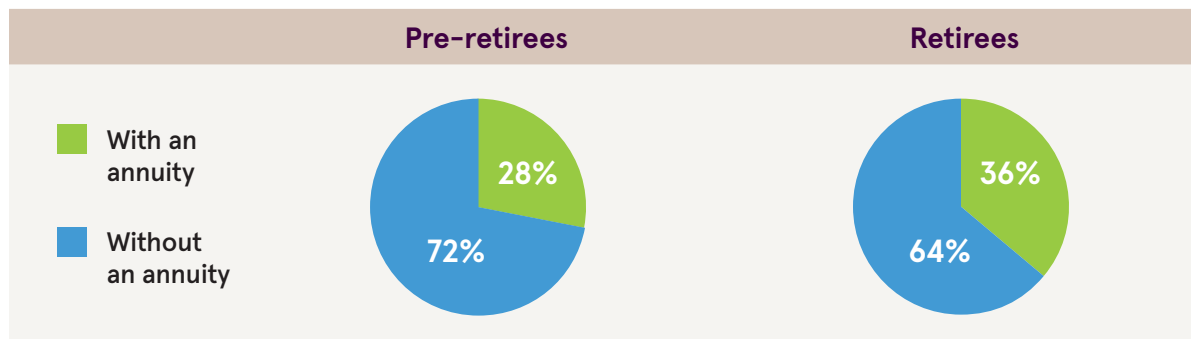
Your clients may already have annuities. In fact, according to our research:

- The average number of pre-retirees with an annuity with guaranteed lifetime income† is 28%
- The average number of retirees with an annuity with guaranteed lifetime income is 36%



### Complimentary annuity analysis

The RIA consultants at Jackson® will review a current contract to help you assess whether it still meets client goals and the potential for a cost reduction. Most importantly, this analysis will help you understand the annuity costs compared with the benefits it provides.



Source: Jackson study of pre-retirees (ages 50-75) and retirees (ages 60-80) with \$250,000 or more in financial assets.

\*Add-on benefits are available for an additional charge.

† Guarantees are backed by the claims-paying ability of the issuing insurance company.

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