



## Jackson's Joe Caruso Receives Insured Retirement Institute's Inaugural Rising Star Award

**LANSING, Mich. — April 4, 2024 —** [Jackson National Life Insurance Company](#)<sup>®</sup> (Jackson<sup>®</sup>), the main operating subsidiary of Jackson Financial Inc.<sup>1</sup> (NYSE: JXN), today announced that Joe Caruso, J.D., LL.M, Assistant Vice President, Government Relations and Public Policy, received the Insured Retirement Institute's (IRI's) 2024 Rising Star Award. Caruso was recognized for his demonstrated leadership within the insured retirement industry at a ceremony held earlier today during the IRI Annual Conference in Nashville, Tenn.

"I am honored to receive this inaugural award and thankful to IRI for the opportunities they provide for many talented leaders across our industry to collaborate and advocate for possible solutions that are in the best interest of retirement savers," said Caruso. "The work IRI does is critically important to improving the overall customer and financial professional experience and providing greater access to the millions of Americans seeking a level of protection in retirement solutions. I look forward to continuing to partner with the team at IRI and other financial services leaders as we work toward a common goal of meeting the needs of American savers."

With a strong foundation in both insurance and securities law, Caruso is an important resource within Jackson, IRI and the broader industry. He has been instrumental in helping increase understanding for how legislative and regulatory proposals and policy changes may impact American retirement savers and the organizations focused on helping them achieve their goal of retirement security, including potential implications for compliance, risk, distribution, operations and other critical business areas.

"We are pleased to present this award to Joe in recognition of his leadership and work to advance IRI's mission and vision," said Wayne Chopus, President and CEO, Insured Retirement Institute. "Joe's commitment to collaboration within the insured retirement industry is exceptional and we expect that he will continue to make a positive impact for years to come."

Caruso has been actively engaged in IRI efforts for five years and was recently named Vice Chair of the Securities Committee. He is also a participant in several other committees including State Affairs, Standard of Conduct and Retirement Plans and Tax. Through his work with the organization, Caruso has helped author significant portions of IRI comment letters regarding the proposed Department of Labor (DOL) fiduciary rule updates, including the most recent

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<sup>1</sup> Jackson Financial Inc. is a U.S. holding company and the direct parent of Jackson Holdings LLC (JHLLC). The wholly-owned direct and indirect subsidiaries of JHLLC include Jackson National Life Insurance Company, Brooke Life Insurance Company, PPM America, Inc. and Jackson National Asset Management, LLC.

proposed updates released in October 2023. Joe's advocacy efforts are critical to helping align policy and regulatory outcomes with industry goals to preserve choice for those saving for retirement.

IRI's rising star award recognizes an emerging leader who shows exemplary service to their profession, colleagues and the insured retirement industry. For more information, about the award, visit <https://www.irionline.org/rising-star/>.

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Jackson® (NYSE: JXN) is committed to helping clarify the complexity of retirement planning—for financial professionals and their clients. Through our range of annuity products, financial know-how, history of award-winning service\* and streamlined experiences, we strive to reduce the confusion that complicates retirement planning. We take a balanced, long-term approach to responsibly serving all our stakeholders, including customers, shareholders, distribution partners, employees, regulators and community partners. We believe by providing clarity for all today, we can help drive better outcomes for tomorrow. For more information, visit [www.jackson.com](http://www.jackson.com).

*\*SQM (Service Quality Measurement Group Inc.) Contact Center Awards Program for 2004 and 2006-2023, for the financial services industry (To achieve world-class certification, 80% or more of call-center customers surveyed must have rated their experience as very satisfied, the highest rating possible).*

Jackson® is the marketing name for Jackson Financial Inc., Jackson National Life Insurance Company® (Home Office: Lansing, Michigan) and Jackson National Life Insurance Company of New York® (Home Office: Purchase, New York).

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