



Jackson and Halo Investing Expand Relationship to Increase RIA Access to New Fee-Based Annuity Solutions

LANSING, Mich. – October 26, 2022 – [Jackson National Life Insurance Company](#)[®] (Jackson[®]), the main operating subsidiary of Jackson Financial Inc.¹ (NYSE: JXN), today announced it has expanded its relationship with Halo Investing (Halo), an award-winning platform for protective investments, to provide registered investment advisors (RIAs) more fee-based options when considering annuities.

Jackson began offering RIAs access to fee-based fixed index annuities (FIAs) and registered index-linked annuities (RILAs) through Halo's outsourced insurance desk (OID), Halo Insurance Services, in October 2021. After a successful first year, the expanded relationship will enable Halo to offer a wider selection of Jackson fee-based annuity solutions, including its RIA exclusive advisory variable annuity, Jackson Retirement Investment Annuity, and its Perspective Advisory II variable annuity, to advisors through Halo's annuity platform. These expanded offerings help foster better client relationships that can grow an RIA's business and demonstrate Jackson's ongoing commitment to the RIA marketplace.

"The team at Halo is excited to strengthen our relationship with Jackson," said Jason Barsema, President, Halo. "Our common mission is to help advisors offer their clients, particularly retirees, effective investment solutions. Fee-based annuities, available through Halo Insurance Services, that span the risk spectrum can be used to construct lasting income protection. Halo looks forward to continuing its mission of impact before profit through strategic partnerships that promote access to low-cost protective investment solutions for all investors."

Americans recognize the risk of outliving their assets. According to an Alliance for Lifetime Income survey conducted with Cannex during the second quarter of 2022, less than half of respondents think their savings and income will last through their lifetimes.² This sobering statistic about the state of the retirement landscape highlights the need for better risk management solutions and protective investments to help ensure individuals' retirements endure. Fortunately, RIAs today can better access ideal products for their clients.

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

² [FA Magazine, A Quarter Of Consumers Have No Financial Plan, Survey Says, September 29, 2022.](#)

“Jackson is committed to increasing RIA access to our advisory annuities through this expanded distribution opportunity with Halo’s Protective Investing Platform,” said Scott Romine, President, Jackson National Life Distributors LLC. “This is the latest example of how Jackson is working to reduce the complexity of achieving financial security by making annuities more accessible as part of a holistic portfolio.”

To learn more about the full suite of Jackson annuities now available to RIAs through Halo Insurance Services, please contact Lee Moses at lee.moses@haloinvesting.com to schedule a consultation.

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ABOUT JACKSON

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 of 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.

**SQM (Service Quality Measurement Group) Contact Center Awards Program for 2004 and 2006-2021, 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).*

ABOUT HALO

Halo Investing is an award-winning technology platform for protective investment solutions. Headquartered in Chicago, with offices in Abu Dhabi, Zurich, Dubai, and Singapore, Halo was co-founded by Biju Kulathakal and Jason Barsema in 2015 with a mission that focuses on putting "impact before profits," providing access to impactful investment opportunities previously unavailable to most investors. Through the Halo platform, financial advisors and investors can easily access structured notes, market-linked CDs, buffered ETFs, and annuities, as well as a suite of tools to educate, analyze, customize, execute, and manage the most suitable protective investment product for their portfolios. Halo has received a growing number of honors and was recently named one of Fast Company's Ten Most Innovative Companies of 2021. For more information, please visit: <http://www.haloinvesting.com>. Halo Investing is not a broker/dealer. Securities offered through Halo Securities LLC, a SEC registered broker/dealer and member of FINRA/SIPC. Halo Securities LLC is affiliated with Halo Investing Insurance Services and Halo Investing. Halo Securities LLC acts solely as distributor/selling agent and is not the issuer or guarantor of any structured note products.

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).

Before investing, investors should carefully consider the investment objectives, risks, charges and expenses of the variable annuity and its underlying investment options. The current contract prospectus and underlying fund prospectuses provide this and other important information. Please contact your financial professional or the Company to obtain the prospectuses. Please read the prospectuses carefully before investing or sending money.

Annuities are long-term, tax-deferred vehicles designed for retirement. Variable annuities involve investment risks and may lose value. Earnings are taxable as ordinary income when distributed. Individuals may be subject to a 10% additional tax for withdrawals before age 59½ unless an exception to the tax is met.

Annuities are issued by Jackson National Life Insurance Company and in New York by Jackson National Life Insurance Company of New York. Variable annuities are distributed by Jackson National Life Distributors LLC. May not be available in all states and state variations may apply. These products have limitations and restrictions. Contact Jackson for more information.

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

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