



## Jackson Wins WealthManagement.com Industry Award

*Jackson's Advanced Planning Team joins the 2023 "Wealthies" Circle*

**LANSING, Mich. — September 8, 2023** — [Jackson National Life Insurance Company](#) (Jackson®), the main operating subsidiary of Jackson Financial Inc.<sup>1</sup> (NYSE: JXN), has been honored by WealthManagement.com with a 2023 "Wealthies" award in the Insurance Service Category for its newly-enhanced Advanced Planning Team. Jackson's Advanced Planning Team has been recognized as an industry leader for its personalized support for financial professionals seeking to model annuities in retirement plans and managed accounts.

"We are honored that our Advanced Planning Team has been recognized for their work to provide clarity around the retirement planning process while offering bespoke options that cater to financial professionals and their clients," said Tim Munsie, Head of RIA, Platform Distribution and Planning for Jackson National Life Distributors LLC, Jackson's marketing and distribution business. "The enhancements we have made to our Advanced Planning Team enable us to deliver valuable knowledge and education unique to the financial planning space, and help financial professionals more confidently serve their clients and better integrate guaranteed income<sup>2</sup> into holistic portfolios."

Launched in February 2023, the Advanced Planning Team builds on the skills of Jackson's Advisory Integration and Advanced Strategies teams, now merged under the new name, to help financial professionals model and construct plans for their clients. The group provides industry-leading service and capabilities, with offerings that include research assistance, sales presentations, asset location and tax strategies, retirement, estate and legacy planning, and more.

The 9<sup>th</sup> Annual [WealthManagement.com Industry Awards program](#) recognizes outstanding organizations and individuals that support financial professional success. The program received more than 1,000 nominations from 413 companies. While 81 firms were recognized as finalists for outstanding achievement in multiple categories, only one winner was announced in each category at an event held on September 7, 2023, in New York City.

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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.

<sup>2</sup> Guarantees are backed by the claims-paying ability of the issuing insurance company and do not apply to the principal amount or investment performance of a variable annuity's separate account or its underlying investments.

## 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 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) Contact Center Awards Program for 2004 and 2006-2022, 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).*

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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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PR3517 09/23