



ANNUITY AGENTS
PODCAST

Brought to you by

Annuity Agents Alliance
Marketing • Sales Process • Case Design

ANTHONY OWEN

- Annuity Agents Alliance, President
- Annuity Innovation Systems, President
- Safe Money Radio Marketing, Co-Founder & Creator

IF YOU WOULD LIKE TO FIND OUT MORE ABOUT

US, CALL OR EMAIL

888-74AGENT (24368) Ext. 100

info@annuityagentsalliance.com

OR VISIT OUR WEBSITE



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Tax Relief Expense Reimbursement Incentive for 2022

Remember when we thought COVID would be over by the end of 2020?

We are grateful for and proud of you as our partners despite the challenges. **In 2021 we saw more agents cross the \$1 million, \$3 million, \$5 million, and \$10 million production levels. We also saw sales of over \$1 million increase threefold.** Almost every single one of those sales came from laddered, inflation hedged, income case design, and **the Annuity Income Planner software we use for our partners was a critical factor in a compelling presentation along with a comprehensive fact finder using our 5-Step Sales Process.**

By the way, you didn't just break the record; you smashed it into pieces! We could not be prouder of our partners. Seeing you persevere and pivot in hard times has been a pleasure to watch and very inspiring for us as coaches and mentors.

Hopefully, 2022 will require less fortitude, but we are positive it will have no less opportunity. We are confident of that. **You will be amazed at some of the things we have coming in 2022!**

To give you a boost towards your marketing budgets, Annuity Agents Alliance is once again offering a **Tax Relief Expense Reimbursement Incentive for 2022**. We call it a tax relief bonus because you will be paid around the time when taxes are due.

Here are the details: *

- **Reimbursement Amount:** Half of our override on **ALL ISSUED PAID FIA ANNUITY BUSINESS** up to a maximum of ¼% (will typically be 25bps for regular surrender periods and ages).
- **Qualification Period:** 1/1/22 to 3/15/22
- **Qualification Volume:** Expense reimbursement will be paid to all partners with a **minimum of \$350,000 in issued FIA business during the qualification period.**
- **Payment Date:** Payment processing will begin on or about the end of April.

*Contact your marketer for conditions of good standing to qualify.



WEEKLY UPDATE

FOR FEBRUARY 15, 2022

[VISIT WINKINTEL.COM >](#) | [VIEW ANALYSIS TOOLS >](#) | [GO TO INDUSTRY NEWS >](#)

Second Lawsuit Challenges DOL On Investment Advice Rule

A second lawsuit in one week challenges the Department of Labor's authority to enforce its Investment Advice Rule governing transactions involving retirement account dollars. The American Securities Association filed a lawsuit Tuesday afternoon in U.S. District Court for the Middle [...]

Aegon Sees Strong Annuity Buyout Demand – Sometimes I wonder if this was the plan from the beginning? Same thing with pensions?

Executives at Aegon — the Dutch parent of Transamerica — say many holders of U.S. variable annuities with rich benefits guarantees would rather have a big cash payment. The executives talked briefly about Transamerica's U.S. variable annuity buyout program Wednesday, [...]

Apollo CEO Questions Other Private Equity Investors' Life Strategy - Apollo acquires balance of Athene. Might be added to the S&P 500.

Marc Rowan — the head of the investment company that controls Athene Holding, and who has helped finance many of the biggest life insurance and annuity sector deals over the past decade — suggested Friday that some other investment companies [...]

MetLife explores sale of variable annuity business – sources – Another insurer offloading VA business. Are they seeing their exposure to a bubble?

NEW YORK, Feb 11 (Reuters) – MetLife Inc (MET.N) is exploring the divestment of its U.S. variable annuity book as it seeks to free up resources to invest in higher-growth parts of its business, people familiar with the matter said. The New [...]

