



Annuity.com

**LEADING
THE AGENT
REVOLUTION!**

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“Early on, I recognized the value of owning an asset and not just selling as a job.

So, when I was introduced to Annuity.com’s philosophy of partnering with agents – making them owners, I was ‘all in!’

We’re going to build an agent-first company worth billions. I hope you’ll join us!”



Roy S.
Annuity.com Founding Agent & Owner



John S.
Certified Financial Fiduciary
Annuity.com Founding Agent & Owner

"I had already made the decision to move my contracts when I met Bill and Brett and learned of Annuity.com. I had been recruited by and was convinced I should join a well-known FMO.

After an intense study of their company, it became clear to me that this was not a choice between two competing marketing organizations, this was a decision between owning or leasing my marketing partner. I chose ownership, not in a small way, but I actually asked to invest. I became an owner from day 1 and moved my contracts the next week.

I hope you'll choose ownership and join me as an owner of Annuity.com,



THE ANNUITY.COM ADVANTAGE

Earn More, Work Less

Only Annuity.com Has 5 Ways for you to get paid!

- 1 FULL STREET** – For experienced Annuity agents, we offer you full street commission from day one, PLUS!
- 2 CAP THE COMPANY** – When you produce \$5 million in annual production, Annuity.com passes along all of the marketing dollars available to help you accelerate your growth. This can mean another 20-30% on the contracts you're currently writing.
- 3 STOCK AWARDS** – We want every Annuity.com advisor to become an owner. That's why we offer stock awards for agents year after year as they qualify. New agents earn \$250 in stock when their first \$100K application is accepted, experienced agents earn \$1000 in stock when they produce \$1 million in annuity sales each year, an additional \$4000 when they produce \$3M each year, and another \$10,000 in stock when they produce \$5M. [Stock awards vest over four years].
- 4 MENTORING PROGRAM** – Annuity.com aspires to have the absolute best advisors in the industry. To accomplish this goal, we have created a mentoring program that allows our best and most successful agents to earn \$12K, \$50K, \$250K, or more a year as a mentor to brand-new agents. On top of the cash compensation, mentors earn \$500 in Annuity.com stock every time they help a new agent write their first \$100K in Fixed Annuities.
- 5 AGENCY BUILDER'S PROGRAM** – Not only do we want our advisors to be owners of Annuity.com, but we want to make it easy for every advisor to build and own their virtual agency. Only with Annuity.com can you build your own agency without investing in office space, employees, or other expensive overhead. As you invite other advisors to join Annuity.com, we'll share 50% of our earnings with your team. You earn not only on the production of those you invite but also on the production of those they invite and those invited by others. Annuity.com agents can earn up to \$22K per agent per year and can earn on agents seven generations from those you invite. This is a true wealth creation opportunity and a chance to build a very valuable business you can sell or will to your family when it's time to retire.

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THE ANNUITY.COM ADVANTAGE

Leading Marketing Support – Annuity.com agents have access to the industry’s most advanced marketing and lead generation programs. Including:

FREE Annuity.com Leads – Annuity.com is becoming the annuity marketplace consumers turn to when they want to put their money to work in an annuity. Only Annuity.com agents have access to these valuable leads for FREE!

Just-in-Time Automated Email—You never know when one of your prospects is ready to deploy capital. That’s why only Annuity.com provides agents with an automated email marketing campaign that sends timely information to their email twice a month. When they’re ready, our email campaigns keep you top of mind!

Online Marketing & Reputation Management—Annuity.com offers industry-leading social media marketing and reputation management services to ensure your success when clients search for you online. Whether you want to extend your research through social media or improve your online image, we have you covered.

Traditional Marketing -We have decades of success with radio, newspaper, direct mail, and seminar marketing. You choose how you want to connect with clients, and we will make the content creation and execution simple and seamless.

FIXED ANNUITIES

Annuity Marketing

Annuity.com provides annuity products for independent agents nationwide.

We provide them with administrative and back-office support for over 60 carriers.

Through our partnership with ECA Marketing Annuity.com provides each agent with an individual sales consultant. These sales consultants are part of a team that in turn are a resource for sales ideas and timely communication of industry trends, sales promotions, and the introduction of new hot products.

Our annuity administrative staff will process and overnight your business directly to companies, track 1035 exchanges and transfers and act as troubleshooters when necessary.

Concepts and Products

Annuity Planning Concepts

- Pension Maximization
- Income Laddering
- Longevity Insurance
- Income For Life
- Wealth Transfer
- Life Insurance Funding
- Annuity Maximization
- Stretch IRA
- Stretch NQ Annuities
- Traditional and Roth IRA

Annuity Products

- Traditional Fixed
- Fixed Indexed
- Deferred Annuities
- MYGA – Multi Year Guarantee
- SPIA – Single Premium
Immediate Annuity
- Medically underwritten SPIA

Fixed Annuity Carriers

- 1891 Financial / NCSF
- Allianz
- American Equity
- American Life
- American National
- Americo
- Aspida
- Assurity
- Athene
- Atlantic Coast
- Capitol Life
- CL Life & Annuity
- Clear Spring (CSL)
- Columbus Life
- Corebridge Financial
- Delaware Life
- ELCO
- EquiTrust
- Farmers (FLIC)
- Fidelity & Guaranty
- (F&G) GBU Financial
- Global Atlantic /
- Accordia Guaranty
- Income Life (GILICO)
- Guardian Life
- Ibexis
- Integrity
- Investors Heritage
- Lafayette
- Legacy Marketing Group
- Legacy Americo
- Legacy Ameritas
- Legacy Integrity
- Liberty Bankers
- Life of the Southwest (LSW)
- Lincoln Financial
- MassMutual
- MassMutual Ascend
- Minnesota Life / Securian
- Mutual Trust Life (MTL)
- Mutual of Omaha / United
- of Omaha
- Nassau
- National Western
- Nationwide
- North American
- National Security Insurance
- Company (NSIC)
- Oceanview
- Ohio National
- Ohio State Life
- OneAmerica / State
- Life Oxford Life
- Pacific
- Pacific Guardian (PGL)
- Penn Mutual
- Principal Financial
- Group Protective
- Prudential
- Reliance Standard
- Royal Neighbors
- Sagicor
- SBLI
- Sentinel
- SILAC
- Standard Insurance
- Symetra
- Wichita National Life



LIFE INSURANCE

Life Insurance Marketing

Through our partnership with ECA Marketing, Annuity.com specializes in Premium Financing, Life Settlements, Business Markets, Estate Planning/Wealth Transfer Concepts, Infinite Banking, Final Expense, and all traditional life insurance.

As an Annuity.com agent, you have “The Power of NFP” behind you. NFP is one of the largest distributors of life insurance in the U.S. with an annual target premium of \$600 Million. We provide you with NFP-dedicated carrier reps, staff support, and underwriters. With over 40 Life Insurance Carriers to choose from, you are always working with some of the most competitive carriers and products for your clients’ needs. Our reputation and service model places us as one of the industry’s leaders.

Annuity.com agents have access to a dedicated life marketing consultant team trained to assist you in advanced case design and implementation. They will personally work with you and your clients to provide solutions for each unique situation.

Concepts & Products

Business Planning Concepts

- Buy / Sell Agreements
- Key Person Plans
- Employee Benefit / Executive Bonus Plans
- Distribution Solutions
- Structured Optimized Life Insurance

Individual Planning Concepts

- Wealth Transfer / Estate Planning
- Annuity Maximization
- Premium Finance
- Life Settlements
- Charitable Giving
- Supplemental Retirement Income

Life Insurance Products

- Fixed-Indexed Universal Life
- Whole Life
- Universal Life
- Simplified / Guaranteed Issue
- Survivorship
- Term
- Final Expense

Life Insurance Carriers

- 1891 Financial / NCSF
- Allianz
- American National
- Americo
- Ameritas
- Assurity
- Banner Life / William
- Penn Brighthouse
- Columbus Life
- Corebridge Financial
- Equitable
- Fidelity & Guaranty (F&G)
- Foresters
- Gerber Life
- Global Atlantic / Accordia
- Guardian
- Illinois Mutual
- John Hancock
- Lafayette
- Liberty Bankers
- Life of the Southwest
- (LSW) Lincoln Financial
- Mass Mutual
- Minnesota Life / Securian
- Mutual of Omaha / United of
- Omaha Mutual Trust Life (MTL)
- National Guardian Life
- National Western
- Nationwide
- New York Life
- North American
- Ohio National
- OneAmerica / State Life
- Pacific
- Penn Mutual
- Principal Financial Group
- Protective
- Prudential
- Royal Neighbors
- Sagicor
- SBLI
- Symetra
- Transamerica Life



MORE ANNUITY.COM ADVANTAGES

Agent Education – Annuity.com actively partners with industry leaders and top carriers to provide our agents numerous opportunities for product and suitability training, CE courses, cutting-edge sales concepts as well as agent forums and academies.

Personal Phone Service – You won't be blindly sent to a voicemail system. Our phones are personally answered from 8-5 CST daily (8-4 on Fridays) and your call will be directed as you request. We will do everything possible to put you in contact with the person you wish to speak with. You will never be "dumped" in a voicemail system without your permission.

Online Contracting – Never complete another contract again! By taking advantage of ECA's free online system you will never have to fill out a contracting application by hand again. Complete an application online once and add carrier contracts as you need them. Documents are easily uploaded and stored and non-resident license renewals can be efficiently filed.

Individually Assigned Contracting Administrator – Your individually assigned Contracting Administrator is here to help you with all your contracting needs. When a contract is submitted, your license, E&O, Anti-Money Laundering, and direct deposit information are kept on hand through our comprehensive and secure archive system. Simply forward any updated information to us and we will update the carriers. The advantage to keeping this information on file not only applies to newly submitted contracts but as carriers request these documents we will have them readily available.

Online Term Applications – Annuity.com is an industry leader in innovations. We offer a true, paperless application process that makes your term life insurance business exceptionally efficient. This process drastically reduces the turnaround time and issues your cases quickly.

New Business Processing – We are proactive with your business. Send your application to us and we'll do the rest. Let us focus on the back-office administration so you don't have to. We will check for missing requirements or errors made on paperwork before it is submitted to the carrier to help speed up the process. We will track your business until it is issued.



MORE ANNUITY.COM ADVANTAGES

Through our Partnership with ECA

Marketing - we are premier partners with many carriers and are set up with special teams and dedicated points of contact in underwriting and new business. We will update you with case status based on your preferred method of communication; memos, emails, phone calls, etc.

Policy Status –You will be able to view your cases that are processed through our office. Information such as client name, policy information, policy numbers, and follow-up comments can be viewed. You may also inquire directly with your case manager through email or a phone call regarding your cases and follow-ups.

SPIA Quoting – Save time and money by going to our central exchange to get accurate SPIA quotes instantly.

Programs – Along with products from over 50 carriers and superior back-office support, we offer sales systems and programs that will help get you in front of more prospects and ultimately increase your sales.

Case Design – Our experienced sales team is well-versed in most individual and business planning concepts and are ready to research and deliver your made-to-order case designs.

20 Plus Experienced Annuity and Life Sales Consultants – As an Annuity.com agent you will have a dedicated annuity and life sales consultant who will get to know you and your business practice. By personally knowing you and your business, your sales consultant will be able to provide you with the best programs, systems, carriers, and products that will help grow your business.

Underwriting Assistance – You also have access to your own in-house underwriter to help with risk assessment and other unique underwriting challenges.



OUR MISSION

At Annuity.com, we understand that worry drains our vitality, steals our happiness, and disrupts our peace of mind. Nothing is more concerning for retiring adults than the fear of outliving their financial resources. That's why our mission is to help our clients worry less and live longer. Our agents create financial plans that empower clients with the assurance that they have a secure financial future that lasts a lifetime.



Brett Blake
CEO
Annuity.com, Inc.

Our Shared Values:

We want our customers, our agents, our employees, and shareholders to worry less so they truly live well. To accomplish our mission, we hold true to these guiding values we intend to follow:

1. **Respect Higher Priorities** – We BELIEVE God, Family and Friends should be more important than earning and preserving financial prosperity.
2. **Do the Right Thing** – We BELIEVE in doing what is right even if it comes at a financial cost.
3. **Strive for Excellence** – We BELIEVE in striving for excellence. While we don't expect perfection, we never settle for less than our very best.
4. **An Abundance Mentality** – We BELIEVE there is always enough to share with others and want to win together. We compete in the market, but not with each other.
5. **Happiness** – We BELIEVE our happiness will bring us success, rather than expect success to bring us happiness. We choose to be happy and hope to infect all in our path with happiness also.
6. **Meaningful Relationships** – We BELIEVE in cultivating long-term meaningful relationships. We want our customers, agents, and employees to find friends in us.
7. **Transparency** – We BELIEVE in building trust through transparency. With all we do we continually seek to establish and build trust through honest and forthright communication.

OWNERS WANTED



Bill Broich
Founder
Annuity.com, Inc.

When I met Brett in late 2023, I was ready to retire. I reached my goal of becoming the first to sell \$100 million in annuities. I loved working with agents and helping the next generation to succeed.

But I'm not retiring – I just can't imagine missing out on what Annuity.com has to offer, and I believe you can't either.

You deserve to reap the rewards flowing so freely to the owners of agencies around us. You deserve to build an asset you can sell to fund your retirement or to will to your family. You deserve the opportunity to associate with the high-quality advisors and mentors already gathering under the Annuity.com brand.

Brett and I are building the most agent-friendly marketing organization in the world, and you deserve to be part of it.

I'm not retiring until I know we have turned tens of thousands of advisors into owners with assets that will fund their dreams.

If you're tired of being an asset, bought or sold to the highest bidder, I invite you to become an owner with Annuity.com.

Bill Broich



Annuity.com

JOIN THE AGENT REVOLUTION!

Join Us Now

[Click Here to Enroll](#)

Email Us

Info@JoinTheAgentRevolution.com

Learn More

[Click Here to visit our website](#)

