

COVID-19 SHINES A LIGHT ON RETIREMENT READINESS

FINANCIAL PROFESSIONALS REVEAL CLIENTS MAY RUN OUT OF SAVINGS WITHOUT BRINGING ANNUITIES INTO THE EQUATION

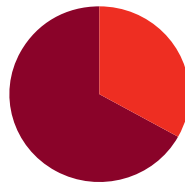
Jackson® and the Insured Retirement Institute (IRI) surveyed 200 financial professionals between April 8 and April 17, 2020.



Risk Amplified During the COVID-19 Pandemic

MORE THAN HALF

of financial professionals believe **25%** or more of their client base is at risk of **running out of money** during retirement.



2/3 OF FINANCIAL PROFESSIONALS

claim clients without annuities are more likely to allocate investments away from risk during **turbulent markets**, providing less opportunity for recovery in or near retirement.

Protection is Priority as Annuities Help Investors Brace for Impact Amid Market Volatility



LIFETIME FEATURES:
78% POSITIVE RATING



TAX DEFERRAL*:
72% POSITIVE RATING



PRINCIPAL PROTECTION:
71% POSITIVE RATING

FINANCIAL PROFESSIONALS GIVE THESE ANNUITY FEATURES HIGH RATINGS FOR HAVING A POSITIVE IMPACT WITH CLIENTS.

* Tax deferral offers no additional value if an annuity is used to fund a qualified plan, such as a 401(k) or IRA. It also may not be available if the annuity is owned by a legal entity such as a corporation or certain types of trusts.

As COVID-19 Changes the World, Annuities are Changing the Conversation for Investors

NEARLY 2/3 OF FINANCIAL PROFESSIONALS

are having more frequent annuity conversations with clients due to

MARKET VOLATILITY.

68%
of financial professionals

REPORT
THEY ARE MORE LIKELY to discuss **ANNUITIES** with **CLIENTS** in the **FUTURE.**

77% OF FINANCIAL PROFESSIONALS

report their clients **ARE RECEPTIVE TO** discussions about **ANNUITIES.**

Survey results based on internet interviews of 200 financial professionals conducted between April 8 and April 17, 2020. Each respondent sold at least one annuity in the past year. Research sponsored by IRI and Jackson.

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To learn more about annuities, and the protection they can offer now and beyond the pandemic, contact your financial professional today.

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