Honorable Mention

By Editorial Staff *Thu, Sep 6, 2018*

New Jackson National campaign depicts aging as beginning, not an end; T. Rowe Price's new ad campaign explains its active management philosophy; Global Atlantic announces annuity product 'overhaul.'

New Jackson National campaign depicts aging as beginning, not an end

Jackson National Life Insurance Company has released "Second Stories," a photo essay book capturing stories from ten older individuals who, instead of retiring after career changes or health setbacks, decided to do something new and exciting.

Second Stories is a component of Jackson's larger "Retire on Purpose" platform, which depicts retirement as a new and exciting chapter in life. The program is designed to help advisors build more holistic practices through "purpose-driven" financial plans.

In addition to Second Stories, Jackson's Purpose program has these components:

Advisor and consumer-facing marketing collateral, including a workbook, presentations, conversation starter cards, flip book, promotional items and seminar invitations. The resources are available to Jackson-appointed advisors.

"Second Stories is a fascinating depiction of how the traditional idea of retirement is evolving," said Dan Starishevsky, senior vice president, Distribution & Advisory Marketing for Jackson National Life Distributors LLC (JNLD), the distribution and marketing arm of Jackson.

"These 10 stories point to a new, exciting opportunity during life after work — while the typical '9-to-5' was largely about paying bills, the second story is about pursuing passions and engaging in meaningful activities. It really makes you think, what's next for me?"

Videos featuring purpose and academic experts Richard Leider and Christine Whelan: https://www.youtube.com/user/JacksonNationalTV.

T. Rowe Price's new ad campaign explains its active management philosophy

T. Rowe Price has launched a new U.S. mass media advertising campaign, "The Full Story," showcasing its strategic investing approach. The campaign is designed to dispel some of the inherent complexity in investing by demonstrating how the firm's investment professionals

conduct research and analyze investment opportunities for its mutual funds and other investment products.

The campaign is now running nationally in digital and print properties, social media channels, and select local TV markets. T. Rowe Price plans to launch its national TV spots in September. T. Rowe Price worked with marketing communications agency J. Walter Thompson New York to develop the campaign.

More information is available at www.troweprice.com/fullstory.

The campaign articulates T. Rowe Price's approach through examples ranging from advancements in bio-technology to the impact of e-commerce on cardboard demand.

The advertisements illustrate T. Rowe Price's active approach to investing. Robert Higginbotham, head of global investment management services for T. Rowe Price, said, "High-quality active management can make a real difference to investors' future financial lives."

Rowe Price is also creating a series of videosto capture some of the stories its hundreds of investment professionals encounter when they explore opportunities and analyze the markets and the companies within them. The company plans to post additional videos to its website over the next few months.

Baltimore-based T. Rowe Price Group, Inc. is a global investment management organization with $1.07 trillion in assets under management as of July 31, 2018. The organization provides mutual funds, subadvisory services, and separate account management for individual and institutional investors, retirement plans, and financial intermediaries.

Global Atlantic announces annuity product 'overhaul'

Global Atlantic Financial Group said this week that it "overhauled its entire suite of fixed index annuities, enhancing both income and death benefit options for those planning for retirement. Options offer guaranteed growth of benefits and are immune to market volatility."

The products now offer additional options and indices among the interest crediting strategies, covering more risk profiles and growth objectives, a Global Atlantic release said.

Additional features available within the updated annuity suite include a feature that can

create greater access to income if required for certain healthcare needs, as well as new death benefit features that create a more substantive legacy.

The new fixed index annuities are available through broker-dealers, banks and independent agents across the U.S. The products are issued by Forethought Life Insurance Company, a Global Atlantic subsidiary. Benefit availability may vary by product, state and firm, the release said.

Citing LIMRA data, the company said it is ranked eighth in U.S. fixed indexed annuity sales as of June 30, 2018, up from thirteenth a year earlier. Global Atlantic was also the third-ranked seller of traditional fixed annuities and Forethought Life's ForeCare contract was the top selling traditional fixed annuity in the second quarter of 2018, according to Wink, Inc.

Global Atlantic was originally the Goldman Sachs Reinsurance Group before it was spun off as an independent company in 2013. It acquired the Aviva USA life insurance business from Athene in 2013, and in 2014 acquired Forethought Financial Group, which had The Hartford's annuity business the year before.

Bankruptcies among those age 65 and older have tripled since 1991, the Global Atlantic release said, citing a study published by the Social Science Research Network. Factors contributing to the increase include the shift of financial responsibility in retirement away from employers and the government, as well as the escalating cost of healthcare.

© 2018 RIJ Publishing LLC. All rights reserved.