

Sammons beefs up the investment options in its rollover IRA funds and annuities

By Editor Test *Thu, Aug 1, 2013*

Sammons has added 36 new mutual funds to its LiveWell and LiveWellPlus Mutual Fund IRA Series offerings and eight investment options to its LiveWell Variable Annuity.

Sammons Retirement Solutions Inc. has added equity, bond and alternative investment options to its LiveWell Retirement Series of mutual fund IRAs and variable annuities. The additions bolster existing offerings in balanced equity/bond and high-yield bonds while adding access to gold and real estate options.

Sammons has added 36 new mutual funds to its LiveWell and LiveWellPlus Mutual Fund IRA Series offerings and eight investment options to its LiveWell Variable Annuity. It also added four new fund companies to its multimanager IRA platform: Columbia Management, First Investors, Pax World and Transamerica. The platform now has 138 funds from 23 managers. Columbia Management and First Investors have also been added to the variable annuity offering.

For the LiveWell Mutual Fund IRA Series, Sammons has broadened the range of socially responsible, balanced equity, international large-cap equity and high-yield bond funds. In addition, a gold fund and a global real estate fund are available on the platform for the first time.

For the LiveWell Variable Annuity, the eight new options expand an investment roster where 90% of the offerings boast a 5-year or longer track record. The additions include two high-yield bond offerings, an emerging markets bond offering and five equity options with large blend, large value, moderate and growth strategies.

The LiveWell Models, a series of risk-based asset class model portfolios created for the LiveWell Retirement Series and developed by Morningstar Associates, LLC, will also be updated.

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