



Digital Platforms and the Guaranteed Income Conundrum

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There are no guarantees in life. Except when it comes to death, taxes, and certain types of income-focused investments. These include the insurance company-issued annuity contracts that are gaining traction among independent advisors.

Once considered the equivalent of a curse word, the annuity has benefited from a sea change in advisor perception. Driving this shift has been the rise of turnkey digital platforms offering configurable access to fixed, variable, and index-linked annuities as well as bank-issued debt (structured notes). Embedded workflow, training, and execution capabilities enable the advisor to add value across the client lifecycle.

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