

**WORKING HARDER  
TO BE YOUR  
CARRIER OF CHOICE**



**NASSAU**

# **NASSAU ELITE 2023 PROGRAM**

**TO RECOGNIZE AND REWARD THE TOP PRODUCERS OF OUR  
PREFERRED DISTRIBUTION PARTNERS**

**NFG.COM**

**FOR PRODUCER USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**



**TOM BUCKINGHAM**  
CHIEF GROWTH OFFICER

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Nassau's sales momentum continued to build in 2022. We plan to accelerate our success even more in 2023, with Elite producers contributing meaningfully to our goals.

Our entire team is ready to help you build your business and make 2023 your best year yet. We look forward to engaging directly with Elite producers frequently this year to ensure we're growing together.

Our product portfolio remains stronger than ever, backed by a team you can count on to deliver best-in-class service. We're always working harder to be your carrier of choice.

Regards,

A handwritten signature in black ink, appearing to read 'TMB', written in a cursive style.

**TOM BUCKINGHAM**

# ABOUT NASSAU FINANCIAL GROUP

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## Annuity Product Portfolio

Committed to providing comprehensive, customizable, and consistent retirement solutions

### Fixed Indexed Annuities

- Nassau Bonus Annuity<sup>SM</sup>
- Nassau Growth Annuity<sup>®</sup>
- Nassau Personal Income Annuity<sup>®</sup>
- Nassau Personal Protection Choice<sup>®</sup>

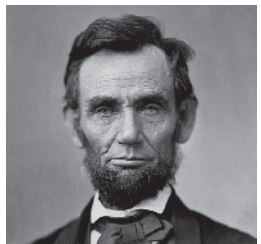
### Multi-Year Guaranteed Annuities

- Nassau Simple Annuity
- Nassau MYAnnuity<sup>®</sup>



Learn More

Nassau is always working harder to be your carrier of choice. We build creative products that can help protect people's savings, deliver guaranteed income, and help pay for health care costs in retirement. We're dedicated to providing you with best-in-class service. We seek to keep things simple and will have your back in the years to come. Nassau Financial Group is headquartered in Hartford, Connecticut with \$18 billion in assets under management and over 380,000 policyholders and contract holders.<sup>1</sup> We have been doing this a long time - 170 years - but we remain humble enough to always try to improve.



### Our Rich History

We insured Abraham Lincoln and paid the claim to his survivors.

### Nassau Life & Annuity Company



**105%**  
Solvency  
Ratio<sup>2</sup>



### Headquartered in Hartford

"The Insurance Capital of the World"

### Excellent



### Nassau Financial Group



**\$18.0 B**  
Assets Under  
Management<sup>1</sup>



**170+**  
Year  
Legacy



**\$1.1 B**  
Total Adjusted  
Capital<sup>1</sup>



**388,000**  
Policies and  
Contracts<sup>1</sup>

Rated 4.9 out of 5 based on over  
**3,350 reviews** on ★ Trustpilot<sup>3</sup>

1. Assets under management, capital, and policies and contracts estimated as of 9/30/22. 2. For Nassau Life and Annuity Company as of 9/30/22. Solvency ratio equals total statutory assets divided by statutory liabilities. This ratio is subject to change and is not a guarantee of a company's financial strength. For more complete information, including financial information for other Nassau Financial Group subsidiaries, visit nfg.com. 3. Trustpilot data as of 12/1/2022 and subject to change.

# FIRST-TIME QUALIFIER BENEFITS

## 1 STRONG COMPENSATION

Earn an extra **50bps** for fixed indexed annuity and **15bps** for MYGA premium<sup>1</sup> placed of eligible products in 2023. Receive the compensation in a single, lump-sum payment after the close of the year.

## 2 ELITE SERVICE

Get direct access to **a dedicated team**, including a new business case manager, wholesaler, and post-issue service representative, as well as express new business processing.

First-time includes any producer who did not qualify for Elite in 2022.

## 3 LEADERSHIP ACCESS

Connect with Nassau's senior management and product development teams to share feedback and ideas.

# 2022 ELITES WHO REQUALIFY IN 2023

Loyalty deserves increased recognition. In addition to **concierge service**, Nassau Elite members who requalify earn additional rewards.

## 1 STRONGER COMPENSATION

2022 Elites who requalify in 2023 will earn **75bps** for fixed indexed annuity and **25bps** for MYGA premium<sup>1</sup> placed in 2023.

## 2 ACCELERATED BONUSES

2022 Elites who requalify in 2023 will receive accelerated compensation incentive payouts, administered the following quarter after requalification in 2023.

**WANT TO LEARN MORE?**

Reach out to our sales desk at 1-888-794-4447.

1. Excludes MYAnnuity 5X placed premium in New York



# QUALIFICATION REQUIREMENTS

## PRODUCTION THRESHOLD

- ✓ Earn **1.75 million** qual. credits
- ✓ Minimum of 5 contracts/policies issued annually
- ✓ \$1 of FIA placed premium = 1 qual. credit
- ✓ \$3 of MYGA placed premium = 1 qual. credit<sup>1</sup>
- ✓ \$1 of Med Supp annualized, placed premium = 14 qual. credits

## ELIGIBLE PRODUCTS<sup>1</sup>

- ✓ Nassau Bonus Annuity<sup>SM</sup>
- ✓ Nassau Growth Annuity<sup>®</sup>
- ✓ Nassau Personal Income Annuity<sup>®</sup>
- ✓ Nassau Personal Protection Choice<sup>®</sup>
- ✓ Nassau MYAnnuity<sup>®</sup> 5X, 7X<sup>1</sup>
- ✓ Nassau Simple Annuity
- ✓ Nassau Medicare Supplement Insurance

### Other Important Details

1. Excludes MYAnnuity 5X placed premium in New York. Eligible products are subject to state approval and may not be available in all states. To learn more, call our sales desk at 1-888-794-4447.

**Qualification period runs from Jan. 1, 2023 to Dec. 31, 2023.** Placed premium excludes free looks and cancellations. Qualification credits only apply to placed premium of eligible products submitted with eligible firms. Participants must have an active contract and be in good standing to receive incentives. Final qualification remains at the sole discretion of Nassau. All compensation payouts remain based on actual fixed indexed annuity and MYGA placed premium, not qualification credits. Compensation increase is proportionally equivalent between Nassau's FIA and MYGA products. Qualification credits or Elite qualification may not be transferred to another appointed individual/agent. All Elite Program payments will be subject to product charge back rules. Program details are subject to change at Nassau's discretion.

**For producer use only. Not for use with the general public.** Product sales must be appropriate, based on a comprehensive evaluation of the customer's financial situation needs and objectives. Product features, riders and availability may vary by state. Nassau Bonus Annuity (19FIA3, ICC19FIA3), Nassau Growth Annuity (19FIA3, ICC19FIA3N), Nassau Personal Income Annuity (ICC19EIAN, 19FIA), Nassau Personal Protection Choice (ICC19EIAN, 19FIA), Nassau Simple Annuity (18FADTCP and ICC18FADTCP), and Nassau MYAnnuity 5X/7X (18IFDAP and ICC18IFDAP/ICC18IFDANP) are issued by Nassau Life and Annuity Company (Hartford, CT). In California, Nassau Life and Annuity Company does business as "Nassau Life and Annuity Insurance Company." Nassau Life and Annuity Company is not authorized to conduct business in ME and NY, but that is subject to change. Medicare Supplement insurance is issued by Nassau Life Insurance Company of Kansas. Nassau Life and Annuity Company and Nassau Life Insurance Company of Kansas are subsidiaries of Nassau Financial Group. The insurers are separate entities and each is responsible only for its own financial condition and contractual obligations.