Five easy steps to doing business

We believe in making things easy, so we developed a digital experience supported by a fully licensed and registered concierge team that completes the suitability/best-interest analysis, makes a product recommendation, and—if appropriate—places the business with Jackson®.

Needs analysis

After registering on jackson.com, advisors can quickly access a digital Client Needs Analysis.

Suitability/Best-interest review and product recommendation*

Based on the analysis of your client's needs and investment profile, our fully licensed and registered concierge team makes a recommendation regarding a Jackson National Life Insurance Company® annuity if doing so is in your client's best interest.

Product review

You will have an opportunity to review the product suggestion for your client. You will confirm that the product recommendation fulfills your client's needs and objectives, and you'll have an opportunity to provide additional information.

Application process

The concierge team completes the necessary application paperwork.

Electronic signatures

You and your client review all required forms and sign electronically.

Contract issuance

Jackson's New Business Operations team processes and issues the contract upon receipt of funds. Advisors then can access, trade, and manage contracts online on behalf of clients.

* We recommend fixed, fixed-index, and variable annuities, and other registered insurance products. Our recommendations are limited to products sponsored by Jackson.

Advisors can contact your Jackson team to discuss how we can help.

CONTACT US

Financial Advisors: 800/711-7397

Email: wealthmanagers@jackson.com

Web: Jackson.com/RIA

Customer Service: 800/644-4565

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