

## Jackson Integrates LifeYield's Smart Householding Tech to Spotlight Tax-Efficient Annuities

### *LifeYield's Software Offers Guidance for Incorporating Annuities into Household-Level Portfolios*

NASHVILLE, Tenn. and BOSTON – March 31, 2020 – [LifeYield LLC](#), a leading cloud-based solution that facilitates tax-efficient management of an investor's entire household portfolio, announced today an alliance with [Jackson National Life Insurance Company](#)<sup>®</sup> (Jackson<sup>®</sup>). Jackson will integrate LifeYield's portfolio management tools into its existing digital toolset. The strategic alliance enables financial professionals who work with Jackson to use LifeYield's powerful technology suite to quantify the potential benefits of incorporating annuity products in client portfolios.

"Jackson is proud to work with LifeYield, an industry leader in providing cutting-edge technology tools that enable financial professionals to utilize tax-efficient household management," said Tim Munsie, senior vice president, Advisory Platform Distribution, Jackson National Life Distributors LLC (JNLD). "As the industry continues to integrate technology within the financial planning process, we recognize the importance of providing the tools financial professionals can use to quantify the potential benefits of incorporating annuities as part of a tax-efficient investment strategy."

LifeYield's simple-to-use tools will provide those who do business with Jackson access to sophisticated technology that is designed to potentially improve investor outcomes through tax-efficient multi-account and product management.

"Clients recognize annuities can be a critical part of their financial picture, particularly when solving for retirement income, and they expect their financial professionals to help them utilize annuities to address the need for income in retirement in a tax-sensitive way," said Mark Hoffman, CEO of LifeYield. "We worked closely with the Jackson team to create an industry-leading capability that incorporates annuities into LifeYield's tax-efficient household management tools. With the help of our technology, users of Jackson's toolset can holistically manage multiple account and product types, while showing the tax efficiency of their strategies in a concrete way."

Jackson and LifeYield are committed to helping financial professionals build and grow their businesses through education, resources and value-add programs. Financial professionals who would like to learn more about Jackson can visit [www.jackson.com/dash](http://www.jackson.com/dash) or call 800-711-JNLD (5653). To learn more about LifeYield's full suite of tools, visit [www.lifeyield.com](http://www.lifeyield.com).

### **About LifeYield**

LifeYield, creators of the [Taxficient Score](#)<sup>®</sup>, enables financial advisors to deliver tax-smart, household-level portfolio solutions. LifeYield's [Proposal Advantage Suite](#)<sup>®</sup> provides a comprehensive, tax-aware view of a client's entire portfolio—analyzing assets across IRAs, 401(k)s and taxable accounts. The Company's easy-to-use tools engage clients so they make and keep more money from accumulation through retirement income, and enhance their ability to achieve their financial goals.

Based in Boston and founded by finance and technology industry leaders, LifeYield's cloud-based software helps advisors improve investor outcomes and enhance their value and experience in supporting goals-based wealth management strategies. For more information, please visit [www.lifeyield.com](http://www.lifeyield.com).

### **About Jackson**

Jackson is a leading provider of retirement products for industry professionals and their clients. The company and its affiliates offer variable, fixed and fixed index annuities designed for tax-efficient growth and distribution of retirement income for retail customers, as well as products for institutional investors. Jackson is a proud founding member and co-chair of the Alliance for Lifetime Income, a nonprofit 501(c)(6) organization formed and supported by 24 of the nation's financial services organizations to create awareness and educate Americans about the importance of protected lifetime income. With \$297.6 billion in IFRS assets\*, the company prides itself on sound corporate risk management practices and strategic technology initiatives. Focused on thought leadership and education, Jackson provides industry insights and financial representative training on retirement planning and alternative investment strategies.

The company is also dedicated to corporate philanthropy and supports nonprofits focused on strengthening families and creating economic opportunities in the communities where its employees live and work. For more information, visit [www.jackson.com](http://www.jackson.com).

*\*Jackson has \$297.6 billion in total IFRS assets and \$269.5 billion in IFRS policy liabilities set aside to pay primarily future policyowner benefits (as of December 31, 2019). International Financial Reporting Standards (IFRS) is a principles-based set of international accounting standards for reporting financial information. IFRS is issued by the International Accounting Standards Board in an effort to increase global comparability of financial statements and results. IFRS is used by Jackson's parent company.*

Jackson is an indirect subsidiary of Prudential plc, an Asia-led portfolio of businesses focused on structural growth markets. The business helps individuals to de-risk their lives and deal with their biggest financial concerns through life and health insurance, and retirement and asset management solutions. Prudential plc has 20 million customers (as of December 31, 2019) and is listed on stock exchanges in London, Hong Kong, Singapore and New York. Prudential plc is not affiliated in any manner with Prudential Financial, Inc., a company whose principal place of business is in the United States of America.

This press release may contain certain statements that constitute “forward-looking statements.” Forward-looking statements include statements concerning plans, objectives, goals, strategies, future events or performance, and underlying assumptions and other statements which are other than statements of historical facts. However, as with any projection or forecast, forward-looking statements are inherently susceptible to a number of risks and uncertainties and actual results and events could differ materially from those currently being anticipated as reflected in such forward-looking statements. There can be no assurance that management’s expectations, beliefs or projections will result or be achieved or accomplished. Any forward-looking statements reflect Jackson’s views and assumptions as of the date of this press release and Jackson disclaims any obligation to update forward-looking information.

Variable annuities are long-term, tax-deferred investments designed for retirement, involve investment risks and may lose value. Earnings are taxable as ordinary income when distributed and may be subject to a 10% additional tax if withdrawn before age 59½.

Jackson is the marketing name for Jackson National Life Insurance Company (Home Office: Lansing, Michigan) and Jackson National Life Insurance Company of New York® (Home Office: Purchase, New York). Jackson National Life Distributors LLC.

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