Partnership Programs

from AIG Life & Retirement

Client Engagement

Business Development

Research & Partner Specialty

Addressing the needs of financial professionals today.

What type of support is most important to financial professionals today? Based on findings from a recent advisor survey, the three most valued activities are providing Market Insights, Access to Product/Portfolio Specialists, and Value-Add/Practice Management programs.*

92% of financial professionals cite Value-Add/Practice Management programs as important, with 47% saying it is very important—outranking Websites, Marketing and Traditional Wholesaling support.

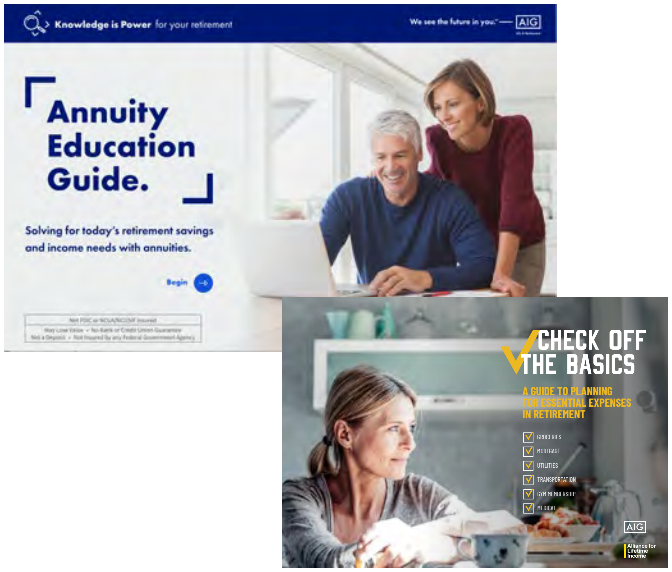
AIG Life & Retirement is a leader in providing award-winning client engagement and business development programs to help financial professionals elevate the growth of their practice, increase client retention and enhance client satisfaction.

Award-winning programs, resources and tools

Our award-winning programs can be optimized through a range of opportunities, including:

- Firm-sponsored conferences
- Break-out sessions / sponsored panels
- Webinars / financial professional lunch & learns
- Focus campaigns & sales desk promotions
- Online resources
- Client and FP videos
- Firm newsletters & marketing libraries
- Social media posts
- Link to AIG Life & Retirement's Client Connections microsite

*Fuse Advisor Trend Monitor Series, March 2021



ANNUITY EDUCATION

This new education program offers a series of tools and resources that highlight the value and importance of using annuities to help address clients' retirement accumulation and income needs—particularly in today's low interest rate environment.

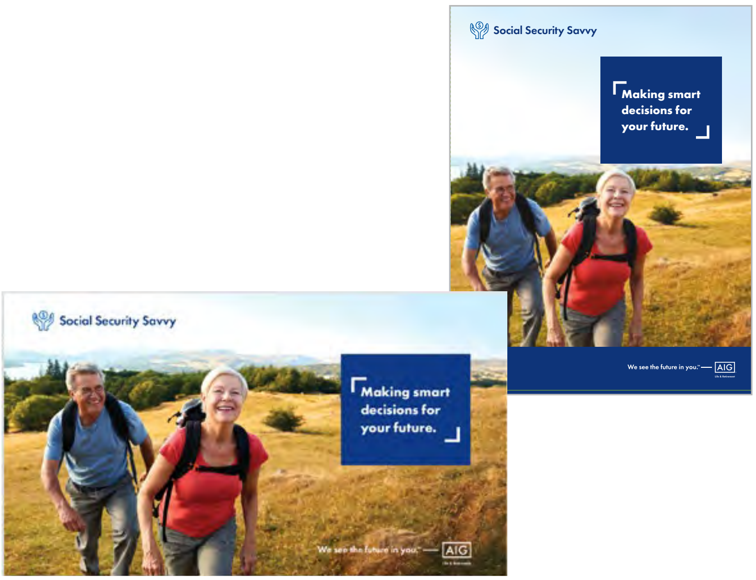
- Annuity Fundamentals includes interactive "Annuity Education Guide" for clients and "Annuity Basics" educational presentation for FPs
- Fixed Income Alternative Toolkit education solution with FP presentation, white paper, emails and calculators
- Check Off the Basics from the Alliance for Lifetime Income helps clients take important first steps in creating a plan for protected lifetime income in retirement M6108F11

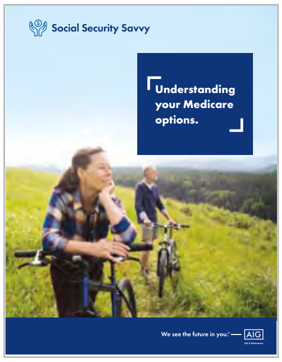
SOCIAL SECURITY SAVVY

This client education and prospecting program is designed to help raise awareness about integrating Social Security benefits with other sources of retirement income.

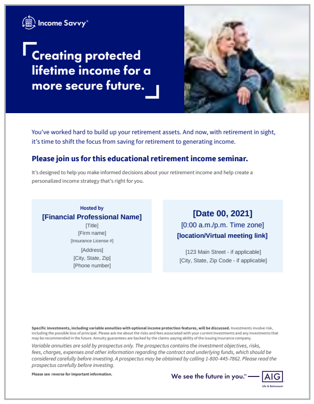
- Making Smart Decisions Client Brochure M5358CBR includes strategies for Married, Divorced and Widowed Clients
- Medicare Client Brochure M5358MED
- Client Powerpoint Presentation M5358CPT
- Fillable PDF Invitation M5358IN1

Also available on https://clientconnections.aig.com/social-security-savvy/





Client Engagement Programs



INCOME SAVVY®

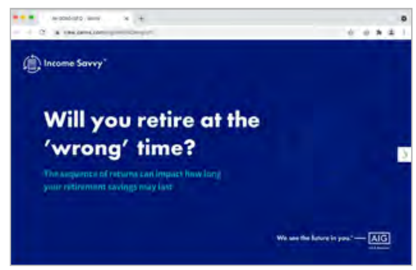
This award-winning program offers a systematized and repeatable process for helping clients shift their focus from saving for retirement to generating income. Income Savvy provides tools to use with clients to review their savings and how they're positioned for retirement income.

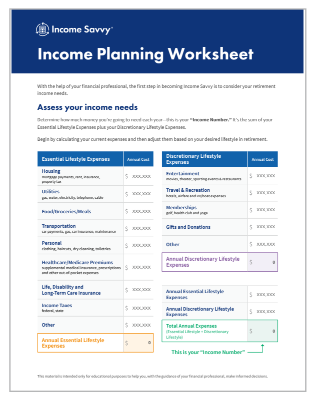
Developed in partnership with Wade Pfau, PhD, CFA®, RICP and Michael Finke, PhD, CFP®, well-known academics published frequently in research and financial journals, the program sets the stage for deep and effective discussions to educate customers and help identify guaranteed income solutions for their retirement income needs.

Income Savvy Business-Building Support

- Client Brochure M6060CBR
- Client Seminar M6060CPT
- Seminar Invitation M6060INV
- Income Savvy Insights and Tips Flip Book M6060FBK*
- Q&A with Dr. Finke & Dr. Pfau M6060QA
- Will You Retire at the Wrong Time (Sequence of Returns) Client Brochure M6060SEQ*
- Visualize Retirement Client Workbook M6060WBK
- Client Worksheet M6060WKS
- Microsite https://clientconnections.aig.com/income-savvy/

* Interactive digital version available on https://clientconnections.aig.com/ income-savvy/





Consumer-Based Research

- Enhancing Retirement Satisfaction Whitepaper M6060CWP

Client Engagement Programs

TAX SAVVY

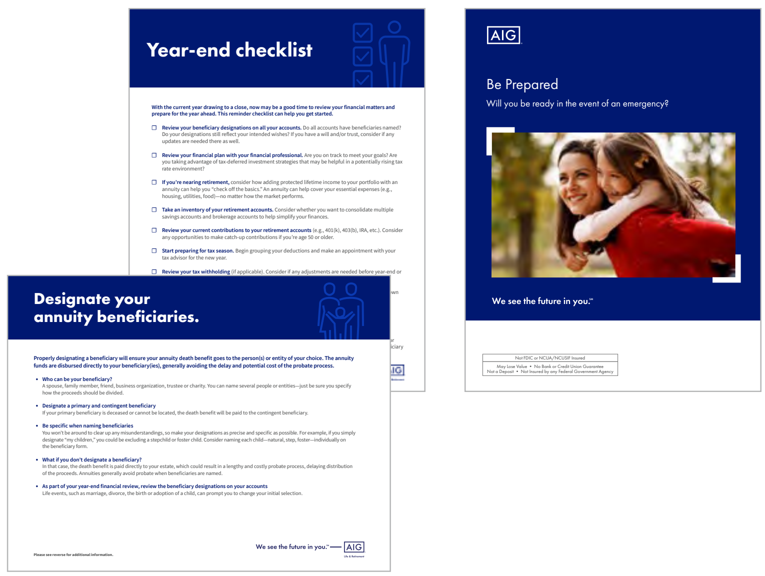
This educational and prospecting program is designed to help clients take a fresh look at their retirement savings and investment strategies with the goal of reducing current taxes.

- Tax Smart Strategies for Retirement Client Brochure M6057CBR
- Webinar Invite M6057INV
- Client Seminar M6057CPT
- Avoid the Social Security Tax Trap Worksheet M6057SSW
- Prospecting Letter M6057PL1
- Tax Facts and Tables Brochure M6057RCK
- Factor Taxes Into Your Saving Strategy Placemat M6057MAT

FUTURE PLANNING/FINANCIAL PREPAREDNESS

Help clients take stock of their financial matters and assess their preparedness with resources from our Financial Preparedness Toolkit.

- Year-end Checklist M6335CHK
- Designate Your Annuity Beneficiaries Educational Flyer M6335FL1
- Be Prepared Fillable Financial Preparedness Journal M6335GDE



RETIREMENT INCOME SOLUTIONS FOR A CHANGING MARKET

This insightful program can help educate clients on the challenges of investing for retirement and the need for guaranteed income.

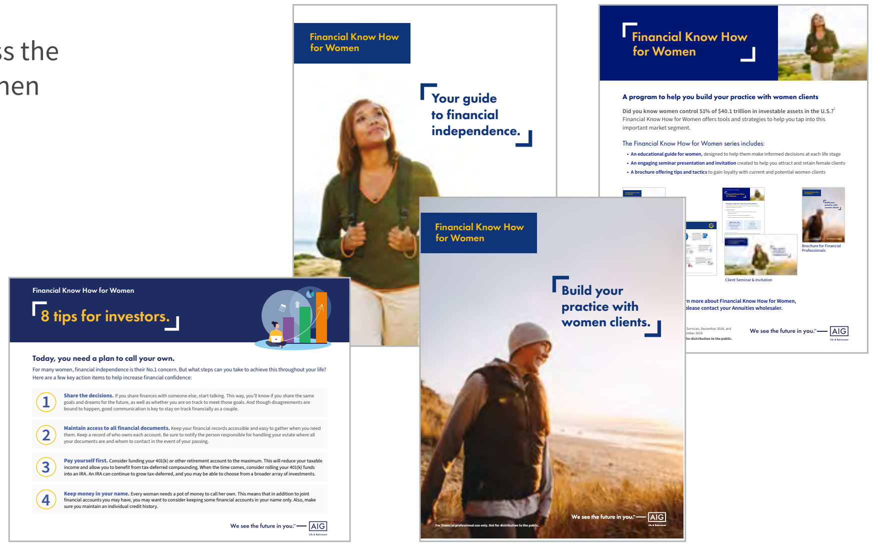
- Client Brochure M4781CBR
- Client Seminar M4781CPT
- Client Seminar Invitation M4781INV

Client Engagement Programs

FINANCIAL KNOW HOW FOR WOMEN

This targeted program is designed to help address the financial planning concerns many women face when preparing for retirement.

- Tips and Strategies Client Brochure M5787CBR
- Client Seminar M5787CPT
- Client Seminar Invitation M5787INV
- 8 Tips for Investors M5787TPG
- Advisor Brochure M5787BRO



EMOTIONS AND YOUR MONEY

This powerful program is designed to help clients avoid costly emotional mistakes and use time-tested strategies to navigate through volatile markets.

- Interactive Client Presentation W4882CBR
- Client Seminar M4882CPT
- Client Seminar Invitation M4882IN3
- Client Flyer M4882SL1

TRANSFORMATIONAL CONVERSATIONS— COMING SOON!

Blueprints from America's top advisor teams

How can we learn from America's fastest-growing, highest-retaining advisor teams? What are they doing differently to drive their success?

Transformational Conversations brings together and distills some of the industry's best client engagement research and ideas—offering financial professionals practical applications to help elevate their practice.

CLIENT CONNECTIONS FROM AIG

Client Connections from AIG® is designed to help financial professionals grow their practice and engage clients with 360° support tools and programs.

The Client Connections microsite provides easy access to our signature business development and client education programs, plus additional tools and resources to help strengthen client connections and build a more digitally savvy practice.

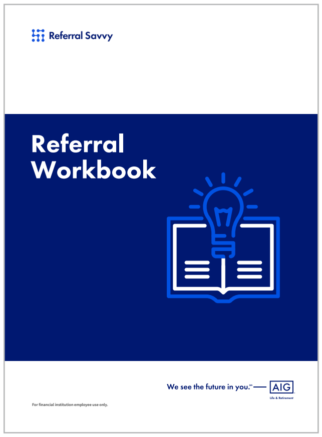
- Enhancing Your Game
- Income Savvy®
- Social Security Savvy
- Videos to Share
- Client Connections Toolkit
- Research & Insights

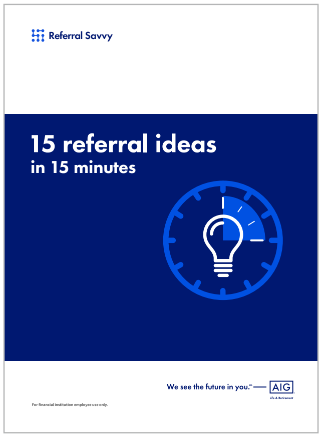
Visit ClientConnections.aig.com today.

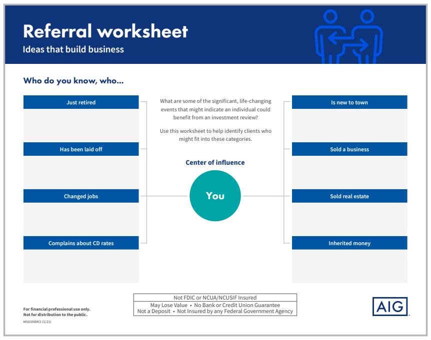
REFERRAL SAVVY

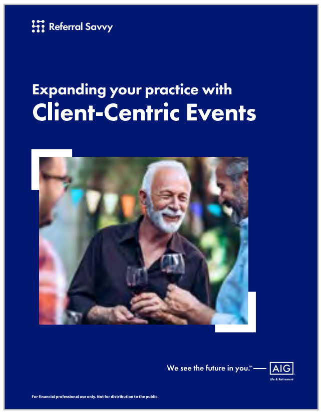
This program is designed to help financial professionals maximize referrals from clients and business professionals to help expand their business.

- Referral Ideas Workbook for Advisors M5659WKB
- 15 Referral Ideas Brochure M5659BR2
- Who Do You Know Worksheet M5659WK3
- Client-Centric Event Planning Guide M5945GDE
- Branch Referral Program Brochure for bank and credit union employees B5659MAN









ENHANCING YOUR GAME

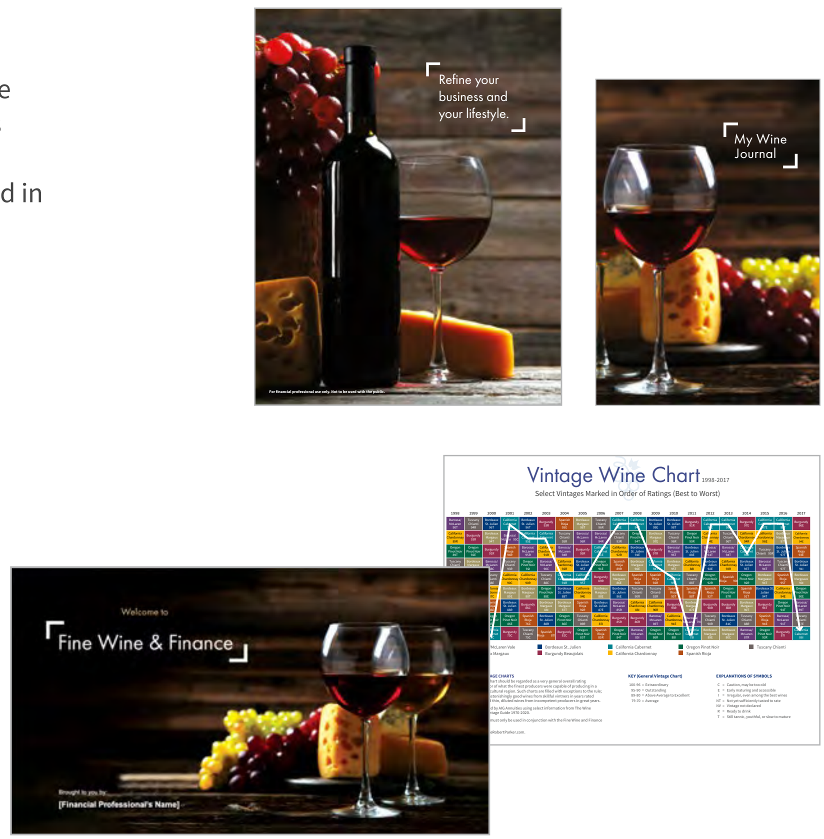
This golf-themed program is aimed at top clients and prospects, and provides an atmosphere for financial professionals to make stronger connections.

- Enhancing Your Game Client Presentation M6271CPT
- Webinar Invitation M6271INV
- Lower Your Handicap Golf Strategies and Techniques Guide M6271BRO
- Putting—The Magic Number 31 Golf Tips Flyer M6271FL1
- 9 Fun Facts for the Back 9— Golf Facts Flyer with annuity close M6271NFF

FINE WINE & FINANCE

This program is designed for clients and prospects and brings them together in an engaging atmosphere of fun and education. The presentation provides tips about selecting and enjoying different wines. It also offers strategies to help clients stay calm and focused in today's changing financial market.

- Client Seminar Fine Wine and Finance M5599CPT
- Fillable Client Seminar Invitation M5599IN2
- Client Vintage Wine and Callan Chart M5599CAL
- Client Wine Tasting Journal M5599MWG
- Advisor Brochure How to Host a Wine Tasting Event M5599GDE



 For financial professional use only. Not for distribution to the public.

ANNUAL BUSINESS PLANNING

This program helps financial professionals understand the importance of business planning and provides direction on efficient and effective ways of developing and executing a successful business plan.

- Business Plan Fillable Template M5596BRO
- Business Plan Quarterly Review worksheet M5596BQR
- Business Plan Webinar Presentation M5596PP1

SOCIAL MEDIA

This timely program offers tools to help financial professionals enhance their Social Media skills. The Playbook for Social Media can help financial professionals reach and engage clients—and attract new ones—in far-reaching and cost-effective ways.

- Social Media Playbook Presentation M5616PPT
- Social Media Playbook M5616BRO

CYBERSECURITY AWARENESS FOR FINANCIAL PROFESSIONALS

This important program provides valuable tips and tools to help financial professionals protect their practice from cyber risks, such as phishing and social engineering. Presentation includes tips on how to keep data safe in today's rapidly changing marketplace.

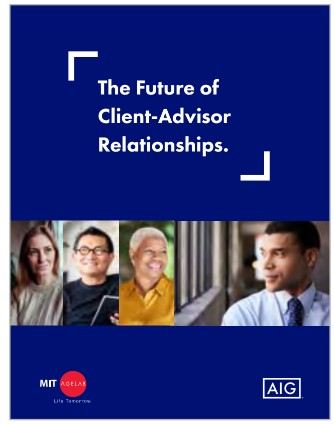
- Cybersecurity Presentation M6004PPT
- Cyber Awareness Checklist M6004CHK

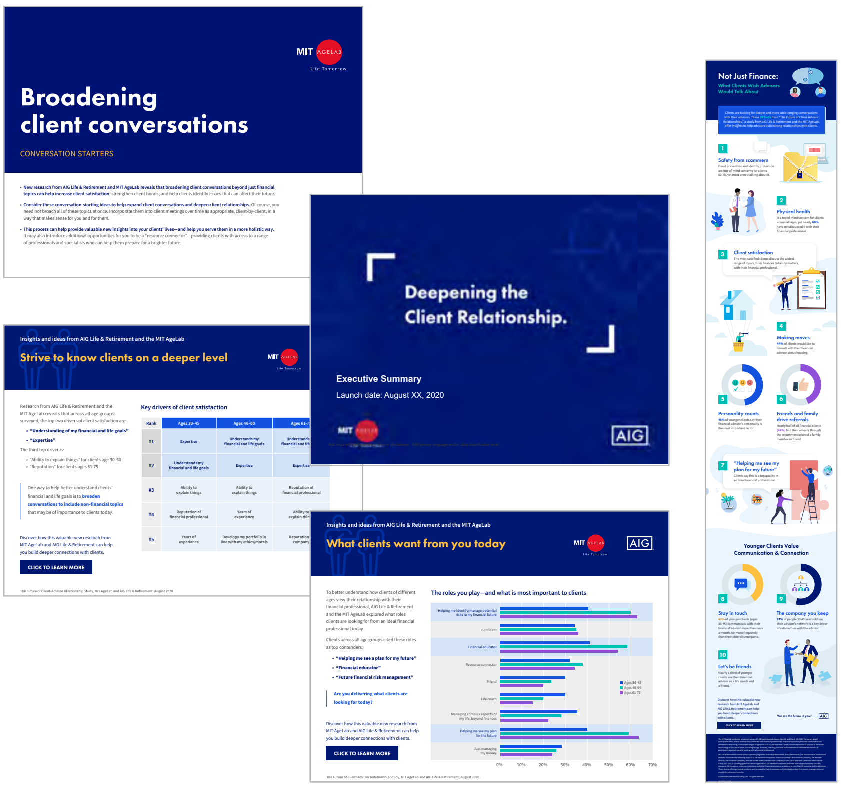
THE FUTURE OF CLIENT-ADVISOR RELATIONSHIPS

Developed in partnership with the MIT AgeLab, this research-based program reveals new opportunities to deepen client relationships by expanding conversations into more non-traditional areas that are of current interest and are highly relevant to your clients' long-term financial well-being.

Discover the available client-approved resources at https://www.lifeandretirement.aig.com/financial-professionals/mit-age-lab-study:

- White Paper
- Executive Summary





Additional tools and resources:

- Conversation Guide and Advisor Insights Digitized Presentation: http://view.ceros.com/aig/conversation-guide-and-insights/p/1
- Conversation Starters Advisor Brochure M6166CS1
- FP Conference Presentation M6166PP1
- Infographic—Not Just Finance M6166IG1
- What Clients Want from You M6166FL1
- Drivers of Client Satisfaction M6166FL3

PROGRAMS AVAILABLE FROM OUR MONEY MANAGERS

AIG Life and Retirement is proud to partner with some of the largest and most respected names in money management.

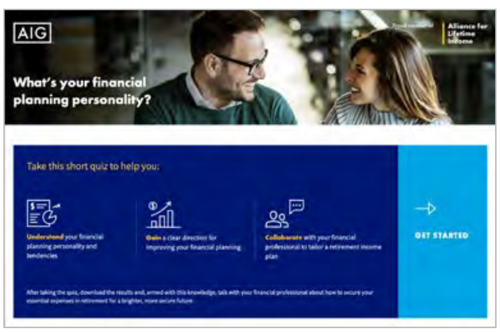
As part of our relationship with these premier organizations, we are pleased to provide you access to many of their signature specialty programs designed to help financial professionals enhance their practice and increase their level of engagement with clients and prospects.

ALLIANCE FOR LIFETIME INCOME

AIG is proud to be a founding board member of the Alliance for Lifetime Income.

Through the Alliance, we're pleased to offer you client research, education and other tools to help clients understand the importance of protected lifetime income.

- Check of the Basics Planning Guide M6108F11
- Starting the Retirement Income Conversation Retirement Checklist M6108AL5
- Annuities Explained Flyer M6108AL6
- Annuities for Protection Article M6108AL8
- Healthcare Costs Article M6108AL7
- America's "Peak 65" Moment Article M6275FL1
- America's "Peak 65" Moment Infographic M6275INF
- Alliance for Lifetime Income Consumer Website: www.protectedincome.org



Resources for financial professionals

- Financial Planning Personality Quiz to share with clients and prospects
- Financial Planning Personality Profiles/ Planning Aid:

  Hopeful Strivers M6108F34

  Optimistic Dreamers M6108F35

  Ambitious Risk-Takers M6108F36

  Cautious Preparers M6108F37

  Purposeful Planners M6108F38
- The Value of Protected Lifetime Income - Financial Professional Interview M6108AL3
- Alliance for Lifetime Income Financial Professional Resource Center: https://resources.protectedincome.org

Client Seminars at a Glance

Income Savvy

Help clients shift their focus from saving for retirement to generating income

- Client Seminar and Invitation M6060CPT, M6060INV

Social Security Savvy

What clients need to know to help make smart decisions about their retirement income

- Client Seminar and Invitation M5358CPT, M5358IN1

Tax Savvy Client Seminar

Help clients take a fresh look at their retirement savings and investment strategies with the goal of reducing current taxes

- Client Seminar and Invitation M6057CPT, M6057INV

Retirement Income Solutions for a Changing Market

Help educate clients on the challenges of investing for retirement and the need for guaranteed income

- Client Seminar and Invitation M4781CPT, M4781INV

Emotions and Your Money

Emotions such as overconfidence or fear can be costly for investors

- Client Seminar and Invitation M4882CPT, M4882IN3

Financial Know-How for Women

Help women clients take control of their financial future

- Client Seminar and Invitation M5787CPT, M5787INV

Fine Wine & Finance

Tips to enhance your clients' wine tasting and investing experience

- Client Seminar and Invitation M5599CPT, M5599IN2

Enhancing Your Game

Tips to help clients enjoy potentially more success in golf and retirement

- Client Seminar and Invitation M6271CPT, M6271INV

lifeandretirement.aig.com

For financial professional use only.
Not for distribution to the public.

We see the future in you.℠ — AIG Life & Retirement

M6227LI2 (12/21)