

7 Ways to Leverage Morningstar® Annuity IntelligenceSM

Morningstar Annuity Intelligence is an easy-to-use, comprehensive resource that gives you key information on variable annuity contracts. Here's how to use the tool right now to enhance your business:

1 **Make Variable Annuities Simple**

Get plain-English descriptions of variable annuities and riders. Morningstar Annuity Intelligence is the most timely and accurate information available on the market, and it's available to you on your desktop.

2 **Enhance Knowledge and Build Confidence**

Having the report as a resource provides you with answers, increases your confidence, and positions you as an expert on variable annuities.

3 **Make 1035 Replacements Clean and Easy**

Run a side-by-side comparison that displays the existing contract next to the proposed contract to make the best case for an exchange.

4 **Improve Efficiency**

Use the Selector tool, the side-by-side comparisons, and the titling matrix to streamline the sales process, improve accuracy in the paperwork process, enhance suitability, and speed up compliance review.

5 **Choose the Best Products For Clients**

You can create side-by-side comparisons for up to three products. You identify the strengths and weaknesses of a contract in no time and find the best solution for a client.

6 **Save Time**

Using Morningstar Annuity Intelligence cuts down on the time you spend digging through prospectuses, calling the sales desk, and sorting through materials.

7 **Increase Sales**

Use the FINRA-approved version of the reports during client meetings to give simple explanations, kick-start conversations, answer questions, and increase sales.

For More Information:

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