

# PeerCompare™ Annuities

Simplify annuity recommendations and generate disclosures in minutes.

WATCH VIDEO

- > Recommend products with built-in suitability checks.
- > Ensure transparent disclosure records, with automated suitability guardrails.
- > Scalable workflows across hundreds of advisors.

The screenshot displays the PeerCompare Annuities interface. It features a 'Selected Product' section for 'Jackson National Life Insurance MarketProtector — Income Accelerator' with a \$100,000 premium and 5-year surrender period. Below this, a 'Suitability' section shows checks for Growth Mechanism, Risk, Cost, and Liquidity / Timing. A 'Suggested Alternatives' section lists other products like 'Allianz Life Insurance Company of North America Retirement Foundation ADV — RFA Income Income' and 'Global Atlantic - Forethought Life Insurance Builder Benefit'. A 'Select Annuity Product + Rider' modal is open, showing options for Carrier (Jackson National Life Insurance), Product (MarketProtector Advisory), Surrender Schedule (0 Years: [0%]), Death Benefit Rider (Standard Death Benefit), and Income Rider (Income Accelerator). At the bottom, a comparison chart shows three metrics: All-in Annual Cost (%) with a value of 1.1 (median 1.15), Liquidity Horizon with a value of 5 yrs (median 7.0 yrs), and Initial Income with a value of \$6,000 (median \$6,300).

...An intuitive platform for our advisor team to assess reasonably available alternatives and document their recommendations

Vice-President, Dealer Compliance  
at leading wealth management firm

# Capture the opportunity with documented, defensible annuities recommendations.

Replace time-consuming manual, form-based workflows with a 'proudly simple' design interface. Whether it's a 1035 exchange or a new policy, assess critical factors like costs and suitability in minutes, not hours.

PeerCompare™ Annuities embeds compliance directly into advisor workflows, giving you:

- > Side-by-side disclosure of alternatives, with RAA documentation.
- > Advisor-friendly disclosures that clients can understand.
- > Records that are audit-ready in minutes.
- > Real-time monitoring of advisor activity with firmwide activity dashboards.

**Reasonably Available Alternatives**

The recommended contract compared against three reasonably comparable alternatives from carriers on the firm's approved product shelf.

	<b>RECOMMENDED</b> Jackson National Life Insurance MarketProtector	ALTERNATIVE 1 Allianz Life Insurance Company of North America Essential Income 7	ALTERNATIVE 2 Midland National Life Insurance Company Summit Edge 10	ALTERNATIVE 3 MassMutual Ascend Life Insurance Company AssuranceSelect 7 Plus
<b>CONTRACT</b>				
Initial premium	\$100,000	\$100,000	\$100,000	\$100,000
Surrender period	7 yrs	7 yrs	10 yrs	7 yrs
Issue ages	0 - 85	0 - 80	0 - 79	0 - 75
<b>FEEES</b>				
M&E	0.00%	0.00%	0.00%	0.00%
Rider fees	1.10%	1.05%	1.25%	1.00%
Total annual	1.10%	1.05%	1.25%	1.00%
<b>INCOME RIDER</b>				
Option	Income Accelerator	Essential Income Benefit - Level Income	Summit IncomeStrategy - Increasing LPA	IncomeSecure

See a demo of PeerCompare™ Annuities  
[InvestorCOM.com/demo](https://InvestorCOM.com/demo)

## About InvestorCOM

InvestorCOM is a leading provider of regulatory compliance software solutions for the wealth management industry. Our high value, intuitive solutions eliminate compliance risk for our clients.