



# 10 Reasons Why We're the Place to Put Your Annuity Business

As one of the largest brokerage agencies, Tellus offers some of the most comprehensive sales, marketing and medical underwriting support available in the industry today.

- 1 Full Portfolio of Fixed Annuity Products**  
We offer a diversified annuity portfolio of more than 100 products from top-rated carriers that are consumer and producer friendly including multi-year guaranteed annuities, bonus annuities, fixed index annuities, single premium immediate annuities, and deferred immediate annuities.
- 2 Dedicated Sales Desk**  
Our dedicated team of wholesalers, sales support associates, and case managers are here to assist you with your annuity sales. From product selection guidance and case discussion on complex cases to pre-sale support and application processing, the Tellus Annuity Solution Center can help grow your business.
- 3 Full-Service Support**  
Every application you submit to Tellus will be assigned to a specialized case manager to review for potential issues before sending to the carrier. Our case managers will work closely with our providers and deliver you a detailed status update. Our licensing and contracting, sales support, and commissions teams ensure policies are issued as quickly as possible.
- 4 GPS – Guaranteed, Predictable Solutions**  
Whether your client is seeking accumulation and growth products or income-oriented products, we are able to offer options for fixed annuity products that can offer solid guarantees<sup>1</sup> that can provide your client with predictable payouts and guaranteed interest rates.
- 5 Education and Training**  
Our wholesalers are dedicated to providing you with the necessary training to succeed in this competitive market. Between webinars, in-person training, presentations, and marketing content, you can become a confident and knowledgeable annuity professional.
- 6 Advanced Strategies Using Annuities**  
Our team can assist you with the planning of case strategies and recommend solutions in areas such as qualified/non-qualified stretch, 72t/q distributions, wealth transfer options, trust-owned annuities, in-service distributions, as well as opportunities that exist for both the business markets, charitable planning situations, and our structured settlement referral program.<sup>2</sup>
- 7 Online Resources Including Current Annuity Rates**  
Through our website, [cbcbrokerage.net](https://www.cbcbrokerage.net), you have the ability to access current rate information. With over 100 products to choose from, our easy-to-read annuity ratesheets are an excellent resource that provides a detailed overview of products, interest rates, and product features. In addition, you can download forms and carrier software, view case status, request carrier supplies, and access additional marketing resources.
- 8 Controls and Compliance Support**  
All materials, programs, and carriers run through an extensive compliance process. Carrier financials and stability in the marketplace are monitored on an ongoing basis and a high quality of due diligence is placed in the selection of appropriate and suitable products.
- 9 Carrier Support**  
Our multiple carrier relationships give us access to dedicated representatives who provide additional support and training – educational webinars and training seminars, as well as online training and access to internal sales desk resources.
- 10 Our People Experience**  
Our team of directors and wholesalers have a combined 150 years of annuity experience. We are knowledgeable, willing, and look forward to providing valuable insight to help grow your practice.

<sup>1</sup> All guarantees are subject to the claims paying ability of the issuing insurer, and to the terms and conditions of the insurance contract at the time of purchase.

<sup>2</sup> Please note that in order to provide a recommendation to a client about the transfer of funds from an investment product, including those within an IRA, 401(k), ROTH IRA, or other retirement plan, to fixed or variable annuity, you must hold the proper securities registration and be currently affiliated with a broker/dealer or registered investment adviser. If you are unsure whether or not the information you are providing to a client represents general guidance or a specific recommendation to liquidate a security, please contact the individual state securities department in the states in which you conduct business.