



# 2024 ELITE PROGRAM

## CONQUER CHALLENGES TOGETHER WITH NASSAU

### 2024 Success

**5M+**

**2-5M**

**1-2M**

**+ 100 bps\***

**+ 75 bps**

**+25 bps**

**Elite Qualifiers  
in 2023**

**+ 75 bps**

**+ 50 bps**

**+25 bps**

**All Others  
in 2023**

2024 Success based on total qualification credits. Compensation increases displayed for fixed indexed annuity (FIA) placed premium in 2024, varies for non-NY MYGA placed premium (see next pages). **5 contract/policy minimum required for compensation enhancements at all levels.** \$1 of FIA placed premium = 1 credit. \$3 of non-NY MYGA placed premium = 1 credit. \$1 of Med Supp annualized, placed premium = 14 credits.

**\*Top-Tier Loyalty Rewards in 2025:** To earn +100bps for FIA placed premium in 2025, you need to achieve 5M+ credits in both 2024 and 2025.

FOR PRODUCER USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.



# NASSAU ELITE 2024 PROGRAM

**WORKING HARDER  
TO BE YOUR  
CARRIER OF CHOICE**



Learn more  
about Nassau

## LET'S MAKE BOTH OUR SALES CLIMB

We can achieve great things together. Nassau's sales rose to a new high in 2023 thanks to our partnerships with producers like you. We plan to build on our success in 2024, with Elite producers contributing meaningfully to our goals.

Our entire team is ready to help you take your sales to the next level in 2024. We look forward to connecting with Elite producers frequently this year to ensure we're growing together.

Our product portfolio remains stronger than ever, backed by a team you can count on to deliver best-in-class service. We're always working harder to be your carrier of choice.

Regards,



**TOM BUCKINGHAM**  
CHIEF GROWTH OFFICER

# 2024 BENEFITS FOR 2023 ELITE QUALIFIERS

2024 Sales Total	1-2M Credits	2-5M Credits	5M+ Credits
Additional Commission	25bps FIA, 8bps MYGA	75bps FIA, 25bps MYGA	100bps FIA, 30bps MYGA*
Exclusive Events		●	●
Concierge Service		●	●
Extra Night, 2025 Retreat		●	●
Accelerated Bonus Payouts		●	●

## 1 EVEN STRONGER COMPENSATION

2023 Elites have more compensation potential. 2023 Elites who earn 2M+ credits in 2024 will receive **accelerated Elite bonus payouts**, administered quarterly after 2M+ credits are achieved.

## 2 ELITE SERVICE

Get direct access to **a dedicated team**, including a new business case manager, wholesaler, and post-issue service representative, as well as express new business processing.

## 3 LEADERSHIP ACCESS

Receive **exclusive invitations** to conferences and events. Connect with Nassau's senior management and product development teams to share feedback and ideas.

## 4 2025 NASSAU ELITE RETREAT

The top 50 Nassau Elite qualifiers and their guests will be invited to **join our senior leadership team** for four days, including airfare. 2023 Elites who qualify for the Retreat will earn an additional night at the end.

**5 contract/policy minimum required for compensation enhancements at all levels.** Excludes MYAnnuity 5X placed premium in New York. Nassau Elite Retreat 2025 invitation ranking based on total qualification credits. Elite Retreat details are subject to change at Nassau's discretion. Compensation based on placed premium, not credits.

\*To earn +100bps for FIA and +30bps for non-NY MYGA placed premium in 2025, you need to achieve 5M+ credits in 2024 and 2025.

# 2024 BENEFITS FOR ALL OTHERS

2024 Sales Total	1-2M Credits	2-5M Credits	5M+ Credits
Additional Commission	25bps FIA, 8bps MYGA	50bps FIA, 15bps MYGA	75bps FIA, 25bps MYGA
Exclusive Events		●	●
Concierge Service		●	●
Extra Night, 2025 Retreat			●
Accelerated Bonus Payouts			

## 1 STRONG COMPENSATION

Earn more commission the more you sell annuities with us. Receive the compensation in a single, lump-sum payment after the close of the year.

## 2 ELITE SERVICE

Get direct access to a dedicated team, including a new business case manager, wholesaler, and post-issue service representative, as well as express new business processing.

## 3 LEADERSHIP ACCESS

Receive exclusive invitations to conferences and events. Connect with Nassau's senior management and product development teams to share feedback and ideas.

## 4 2025 NASSAU ELITE RETREAT

The top 50 Nassau Elite qualifiers and their guests will be invited to join our senior leadership team for four days, including airfare. Write 5M+ Elite credits to secure an additional night at the end.

**5 contract/policy minimum required for compensation enhancements at all levels.** Excludes MYAnnuity 5X placed premium in New York. Nassau Elite Retreat 2025 invitation ranking based on total qualification credits. Elite Retreat details are subject to change at Nassau's discretion. Compensation based on placed premium, not credits.

To earn +100bps for FIA and +30bps for non-NY MYGA placed premium in 2025, you need to achieve 5M+ credits in 2024 and 2025.

# REACH THE ELITE SUMMIT

## HOW TO EARN CREDITS

- ✓ \$1 of FIA placed premium = 1 credit
- ✓ \$3 of MYGA placed premium = 1 credit<sup>1</sup>
- ✓ \$1 of Med Supp annualized, placed premium = 14 credits

## ELIGIBLE PRODUCTS<sup>1</sup>

- ✓ Nassau Income Accelerator
- ✓ Nassau Bonus Annuity<sup>SM</sup>
- ✓ Nassau Growth Annuity<sup>®</sup>
- ✓ Nassau Personal Income Annuity<sup>®</sup>
- ✓ Nassau Personal Protection Choice<sup>®</sup>
- ✓ Nassau MYAnnuity<sup>®</sup> 5X, 7X<sup>1</sup>
- ✓ Nassau Simple Annuity
- ✓ Nassau Medicare Supplement Insurance

### Other Important Details

1. Excludes MYAnnuity 5X placed premium in New York. Eligible products are subject to state approval and may not be available in all states.

**Qualification period runs from Jan. 1, 2024 to Dec. 31, 2024.** Placed premium excludes free looks and cancellations. Qualification credits only apply to placed premium of eligible products submitted with eligible firms. Participants must have an active contract and be in good standing to receive incentives. Final qualification remains at the sole discretion of Nassau. All compensation payouts remain based on actual fixed indexed annuity and MYGA placed premium, not qualification credits. Compensation increases are proportionally equivalent between Nassau's FIA and MYGA products. **5 contract/policy minimum for compensation enhancements at all levels.** Qualification credits or Elite qualification may not be transferred to another appointed individual/agent. All Elite Program payments will be subject to product charge back rules. Some event expenses related to you (and your potential guests) that are associated with the Nassau Elite Producer Program may be taxable to you and reported on a 1099-NEC. You should consult your tax advisor if you have questions about the tax treatment related to any event-related expenses or your individual situation. Nassau is unable to substitute cash equivalent or awards in lieu of attendance. 2024 and 2025 program details are subject to change at Nassau's discretion.

**For producer use only. Not for use with the general public.** Product sales must be appropriate, based on a comprehensive evaluation of the customer's financial situation needs and objectives. Product features, riders and availability may vary by state. Nassau Income Accelerator (ICC19EIAN, 19FIA), Nassau Bonus Annuity (19FIA3, ICC19FIA3), Nassau Growth Annuity (19FIA3, ICC19FIA3N), Nassau Personal Income Annuity (ICC19EIAN, 19FIA, 19ISN), Nassau Personal Protection Choice (ICC19EIAN, 19FIA, 19RN), Nassau Simple Annuity (18FADTCP and ICC18FADTCP), and Nassau MYAnnuity 5X/7X (18IFDAP and ICC18IFDAP/ICC18IFDANP) are issued by Nassau Life and Annuity Company (Hartford, CT). In California, Nassau Life and Annuity Company does business as "Nassau Life and Annuity Insurance Company." Nassau Life and Annuity Company is not authorized to conduct business in ME and NY, but that is subject to change. Medicare Supplement insurance is issued by Nassau Life Insurance Company of Kansas. Nassau Life and Annuity Company and Nassau Life Insurance Company of Kansas are subsidiaries of Nassau Financial Group. The insurers are separate entities and each is responsible only for its own financial condition and contractual obligations.