



## Jackson Joins SIMON from iCapital's Insurtech Platform

**LANSING, Mich. — February 16, 2023** — [Jackson National Life Insurance Company](#)<sup>®</sup> (Jackson<sup>®</sup>), the main operating subsidiary of Jackson Financial Inc.<sup>1</sup> (NYSE: JXN), today announced plans to add a selection of its annuity solutions to SIMON from iCapital's<sup>2</sup> insurtech platform. By integrating its product offerings with SIMON from iCapital's marketplace, Jackson will provide wealth management firms with increased access to its suite of annuities and product education tools, giving financial professionals increased flexibility as they support the evolving portfolio needs of their clients.

Jackson's suite of registered index-linked annuity (RILA) products — Jackson Market Link Pro<sup>SM</sup> and Jackson Market Link Pro Advisory<sup>SM</sup> — are now available on SIMON from iCapital's marketplace. Additional Jackson product offerings will be added to the marketplace by the end of March 2023.

"As one of the leading annuity providers in the U.S., we're excited to be integrating with SIMON from iCapital's annuities platform, which will further increase financial professionals' access to our spectrum of retirement products," said Tim Munsie, Head of RIA Platform Distribution and Planning, Jackson National Life Distributors LLC. "This announcement represents another step in our mission to help simplify retirement planning by making it easier for financial professionals to incorporate annuities as part of a holistic portfolio and serve their clients' retirement income planning needs."

With SIMON from iCapital's platform for annuities, financial professionals gain centralized access to the tools and resources they need to analyze marketplace products based on their clients' unique risk profiles and investment horizons, including the ability to explore various benefit rider illustrations, leverage powerful allocation analytics, view fund options and their performance statistics, and explore the historical performance of allocations and funds.

"This partnership with Jackson demonstrates our commitment to creating opportunities for financial professionals to efficiently access annuity options for their clients through SIMON from iCapital's marketplace," said Scott Beshany, Managing Director and Head of Annuities Solutions, iCapital Solutions. "We are thrilled to welcome Jackson as our newest carrier partner and look forward to supporting the firm as they engage with our platform."

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<sup>1</sup> Jackson Financial Inc. is a U.S. holding company and the direct parent of Jackson Holdings LLC (JHLLC). The wholly-owned direct and indirect subsidiaries of JHLLC include Jackson National Life Insurance Company, Brooke Life Insurance Company, PPM America, Inc. and Jackson National Asset Management, LLC.

<sup>2</sup> Institutional Capital Network, Inc., and its affiliates (together, "iCapital Network" or "iCapital")

To learn more about the full suite of Jackson annuities currently and soon to be available to financial professionals through SIMON from iCapital's marketplace, please visit [Jackson.com](http://Jackson.com).

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#### **ABOUT JACKSON**

Jackson® (NYSE: JXN) is committed to helping clarify the complexity of retirement planning—for financial professionals and their clients. Through our range of annuity products, financial know-how, history of award-winning service\* and streamlined experiences, we strive to reduce the confusion that complicates retirement planning. We take a balanced, long-term approach to responsibly serving all our stakeholders, including customers, shareholders, distribution partners, employees, regulators and community partners. We believe by providing clarity for all today, we can help drive better outcomes for tomorrow. For more information, visit [www.jackson.com](http://www.jackson.com).

*\*SQM (Service Quality Measurement Group) Contact Center Awards Program for 2004 and 2006-2021, for the financial services industry. (To achieve world-class certification, 80% or more of call-center customers surveyed must have rated their experience as very satisfied, the highest rating possible).*

#### **ABOUT ICAPITAL**

[iCapital](http://iCapital) is the leading global fintech company powering the world's alternative investment marketplace. We have transformed how the wealth management, banking, and asset management industries facilitate access for clients to private investments, including equity, credit, real estate, infrastructure, structured investments, annuities, and risk-managed solutions. We do this through intuitive, end-to-end technology and supporting services; education tools and resources; and robust diligence, compliance, and portfolio analytics capabilities. For more information, visit [icapital.com](http://icapital.com).

Jackson® is the marketing name for Jackson Financial Inc., Jackson National Life Insurance Company® (Home Office: Lansing, Michigan) and Jackson National Life Insurance Company of New York® (Home Office: Purchase, New York).

Registered index-linked annuities are issued by Jackson National Life Insurance Company (Home Office: Lansing, Michigan). Registered index-linked annuities are distributed by Jackson National Life Distributors LLC, member FINRA. These contracts have limitations and restrictions. Jackson issues other annuities with similar features, benefits, limitations, and charges. Discuss them with your financial professional or contact Jackson for more information.

Guarantees are backed by the claims-paying ability of the issuing insurance company.

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**Media Contacts:**

Patrick Rich

Jackson

[patrick.rich@jackson.com](mailto:patrick.rich@jackson.com)

Morgan Miller

iCapital via The Neibart Group

[icapital@neibartgroup.com](mailto:icapital@neibartgroup.com)

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