

## LIFE INSURANCE IN QUALIFIED PLANS

Carrier	Will Carrier Allow QP Ownership?	Available Products	Documents Required	Can Sell in Defined Benefit Plans?	Can Sell in 412 Plans?
ANICO	Only unisex plans	Limited Pay Whole-Life & Signature Performance (IUL19-U)	Pension Documents - need first two pages and the signature page with the designated person signature signing on behalf of the Pension Plan	Yes	Only fixed products - Limited Pay Whole Life
Banner Life	No			NA	
Corebridge Financial	No			NA	
Equitable	Yes	All Products Available	<a href="#">Plan Installation Form</a>	Yes	No
F&G Life	No	N/A	N/A	NA	No
Foresters Financial	No			NA	
Global Atlantic	No			NA	
John Hancock	Yes	All Permanent Products	<a href="#">84-24 Fiduciary Approval Form</a> <a href="#">Certification by Trustee Form</a>	Yes	No
Lincoln Financial	Yes	All Products Available	<a href="#">Disclosure, Acknowledgement and Indemnity Agreement Form</a>	Yes	No
MassMutual	Yes	All retail WL, Term, UL. CareChoice One, CareChoice Select and Apex VUL are not available.	Application, QP Questionnaire required, including name of TPA (all cases must have a third party administrator); producers should complete training that we will provide in hard copy; all cases reviewed by MM Business acceptance team/Advanced Sales	Yes	Yes, but only through MM-approved TPAs
Mutual Of Omaha	No			NA	
Nationwide	No			NA	
New York Life	No			NA	
North American	No			NA	
OneAmerica	No			NA	
Principal	Yes	All Products Available	Reach out to Advanced Sales Team	Yes	No
Protective	No	Advantage Choice UL Indexed Choice UL ProClassic II UL Strategic Objectives II VUL Non Par Whole Life	A Hold Harmless Agreement required	Yes	No
Prudential	No			NA	
Sagicor	No			NA	
Securian Financial	Yes	All Products Available	None	Yes	No
Symetra	No			NA	
Transamerica	No			NA	
William Penn	No			NA	
Zurich	Yes	Select IUL and Wealth Builder IUL	<a href="#">QP Disclosure: Select IUL</a> <a href="#">QP Disclosure: Wealth Builder IUL</a> Copy of the Qualified Plan Agreement	Yes	With Home Office Approval

Updated 2/26/23

For informational purposes only. Not Binding. Please consult carrier documentation for additional details.