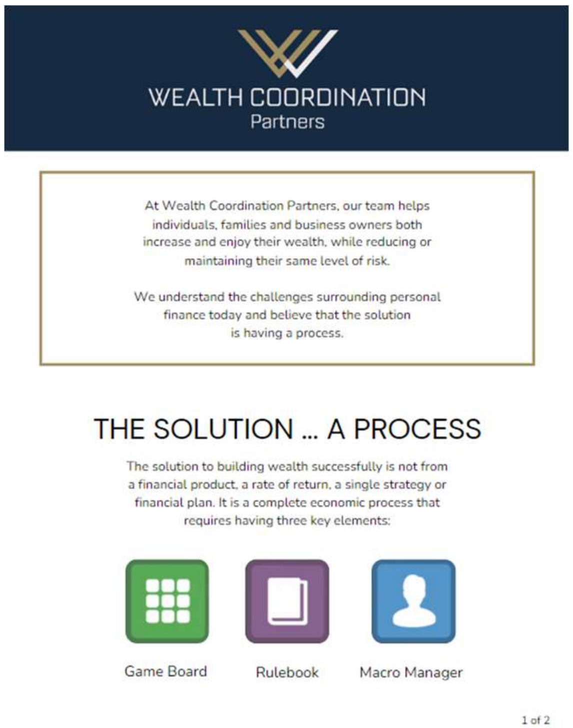
Jill Hartmann

15+ years of experience in marketing strategy and execution, digital marketing, leadership and coaching

Sample work portfolio

https://www.linkedin.com/in/jillhartmann/

Design


WEALTH COORDINATION
Partners

At Wealth Coordination Partners, our team helps individuals, families and business owners both increase and enjoy their wealth, while reducing or maintaining their same level of risk.

We understand the challenges surrounding personal finance today and believe that the solution is having a process.

THE SOLUTION … A PROCESS

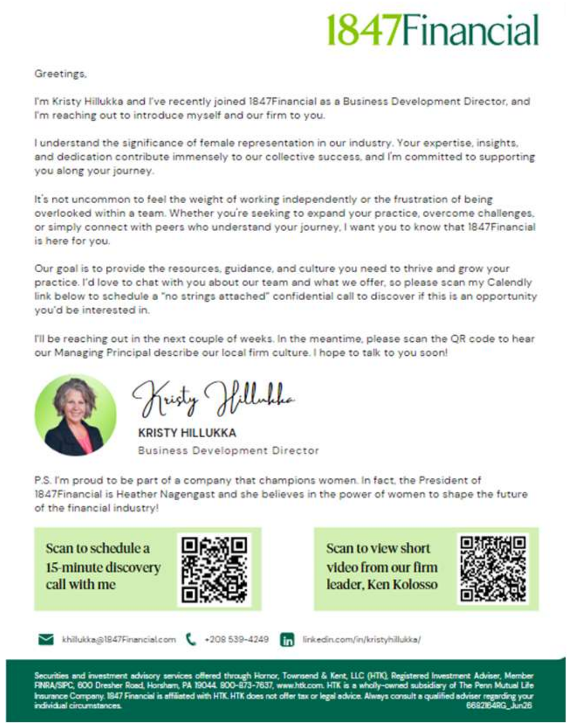
The solution to building wealth successfully is not from a financial product, a rate of return, a single strategy or financial plan. It is a complete economic process that requires having three key elements:

Game Board

Rulebook

Macro Manager

1 of 2


1847Financial

Greetings,

I'm Kristy Hillukka and I've recently joined 1847Financial as a Business Development Director, and I'm reaching out to introduce myself and our firm to you.

I understand the significance of female representation in our industry. Your expertise, insights, and dedication contribute immensely to our collective success, and I'm committed to supporting you along your journey.

It's not uncommon to feel the weight of working independently or the frustration of being overlooked within a team. Whether you're seeking to expand your practice, overcome challenges, or simply connect with peers who understand your journey, I want you to know that 1847Financial is here for you.

Our goal is to provide the resources, guidance, and culture you need to thrive and grow your practice. I'd love to chat with you about our team and what we offer, so please scan my Calendly link below to schedule a "no strings attached" confidential call to discover if this is an opportunity you'd be interested in.

I'll be reaching out in the next couple of weeks. In the meantime, please scan the QR code to hear our Managing Principal describe our local firm culture. I hope to talk to you soon!

Kristy Hillukka

KRISTY HILLUKKA
Business Development Director

P.S. I'm proud to be part of a company that champions women. In fact, the President of 1847Financial is Heather Nagengast and she believes in the power of women to shape the future of the financial industry!

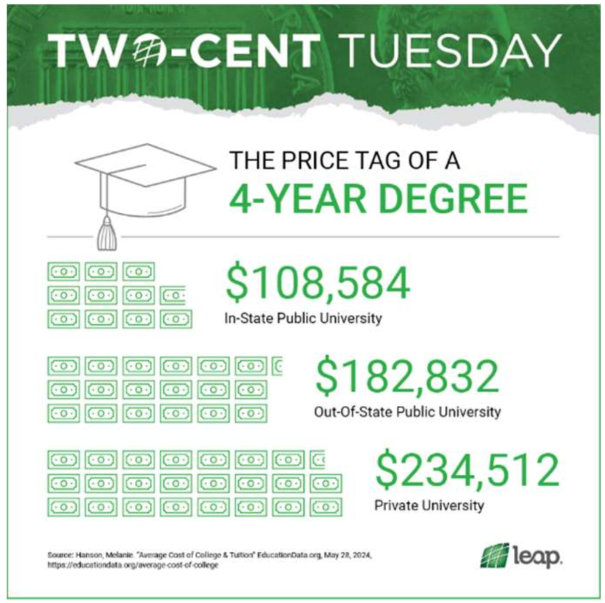
Scan to schedule a 15-minute discovery call with me

Scan to view short video from our firm leader, Ken Kolosso

khillukka@1847Financial.com +208 539-4249 linkedin.com/in/kristyhillukka/

Securities and investment advisory services offered through Hornor, Townsend & Kent, LLC (HTK), Registered Investment Adviser, Member FINRA/SIPC, 600 Dresher Road, Horsham, PA 19044. 800-873-7637, www.htk.com. HTK is a wholly-owned subsidiary of The Penn Mutual Life Insurance Company. 1847 Financial is affiliated with HTK. HTK does not offer tax or legal advice. Always consult a qualified adviser regarding your individual circumstances. 6682184RG_Jun26

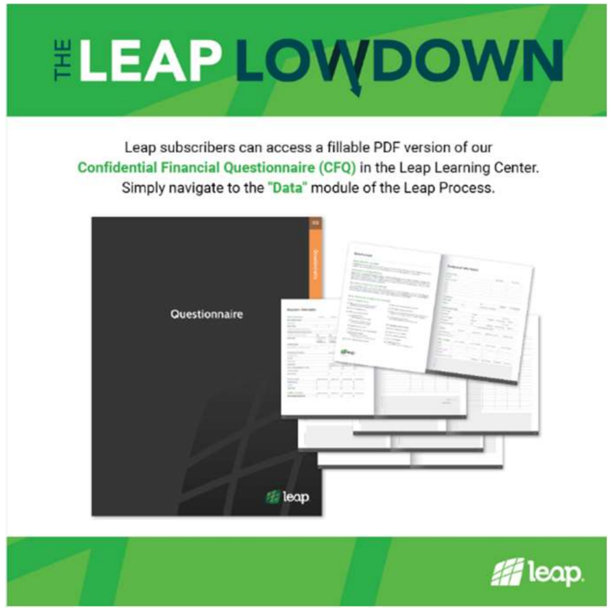
Social Media Campaigns



Intro post (July 2)
Get ready for Two-Cent Tuesdays starting next week! We're excited to bring you bite-sized statistics, tips, and ideas showcasing fantastic financial content at your fingertips. These quick tips, facts, and figures are designed to help you start conversations with your clients and make an impact in their financial futures.
#TwoCentTuesday

Post 1 (July 9) – COLLEGE SAVINGS
Curious about the price tag of a 4-year degree? Let's crunch the numbers to help start the conversation with your clients. Those attending an in-state public university, expect to pay around $108,584 over four years. Out-of-state? That bumps up to $182,832. And for private universities, it's roughly $234,512.
It's time to strategize a plan with your clients.
Source: Hanson, Melanie. "Average Cost of College & Tuition" EducationData.org, May 28, 2024, https://educationdata.org/average-cost-of-college
#TwoCentTuesday

Social Media Campaigns



Introducing Leap Lowdown: Tips and tricks to help you get the most out of your Leap experience. This new series is designed specifically for our valued Leap subscribers. Whether you're a seasoned pro or new to the platform, our monthly posts will provide you with actionable insights to enhance your productivity and drive your success. We're here to support your journey and ensure you make the most of everything Leap has to offer. Follow our page and join the conversation using #LeapLowdown

Leap offers a comprehensive 12-page client questionnaire designed to help financial professionals gather essential financial data. This tool provides all the information needed to build a client's Present Position Model and kick start your collaboration with them. Leap subscribers can access a fillable PDF version in the Leap Learning Center. Simply navigate to the "Data" module of the Leap Process.
Interested in subscribing to Leap? Learn more and sign up here: https://www.leapcp.com/reg#sign-up

Social Media

Recruiting email campaign

Provide warm leads to Head of Business Development, Wealth Management

May/June 2024

Target Audience – Discovery Data Criteria

- Wealth management/holistic planners
- 2-15 year of experience
- Smaller/mid-sized firms
- Series 6, 7, 65, 66
- Advisor AUM: $10-50 million
- List size: 1,857

How?

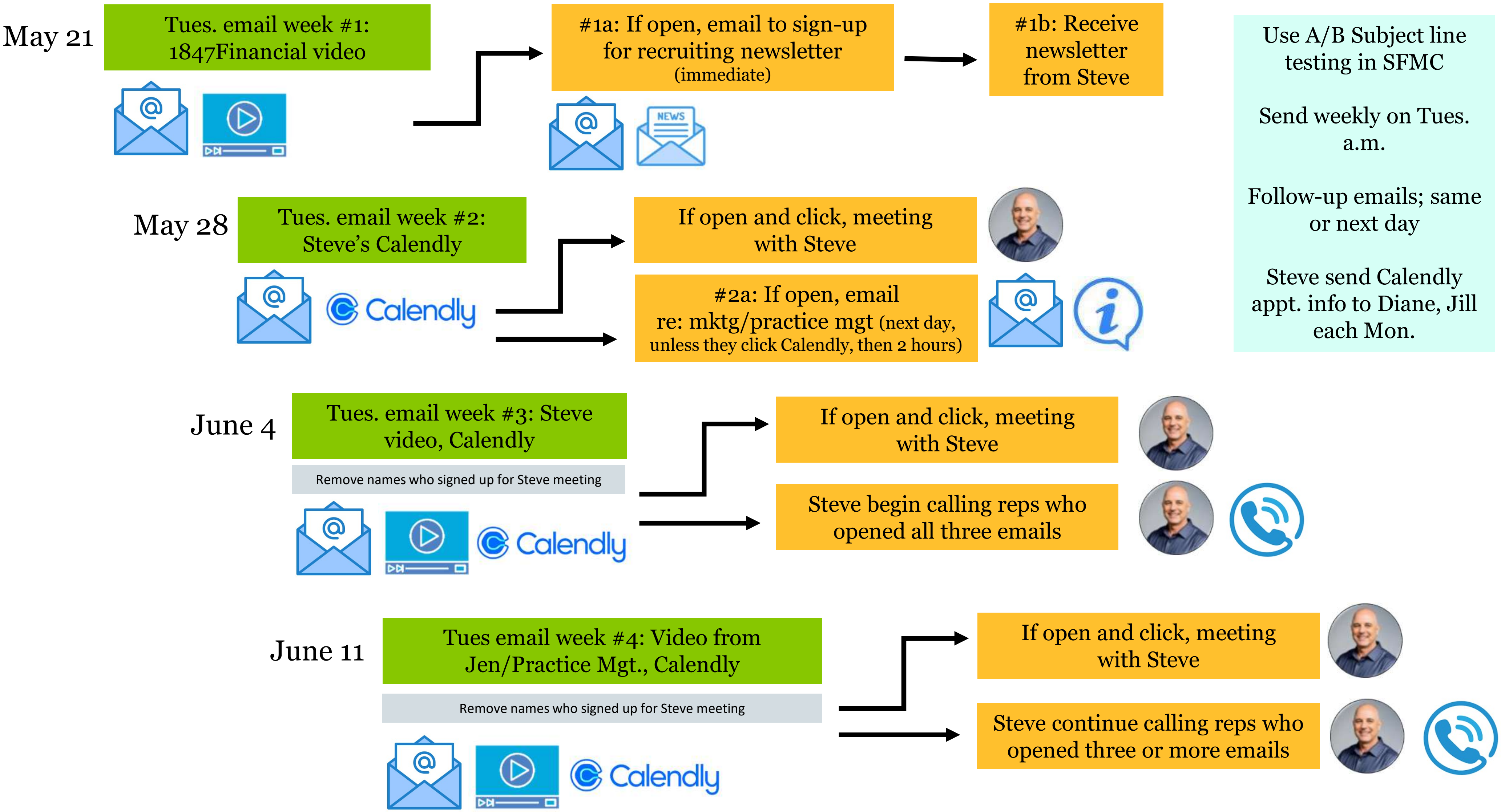
- Use Discovery, send series of personalized email from Head of Business Development to targeted reps.
- Allow reps. to schedule 15 min. meeting
- Phone calls will be made after rep. has taken action (e.g. opens, clicks)

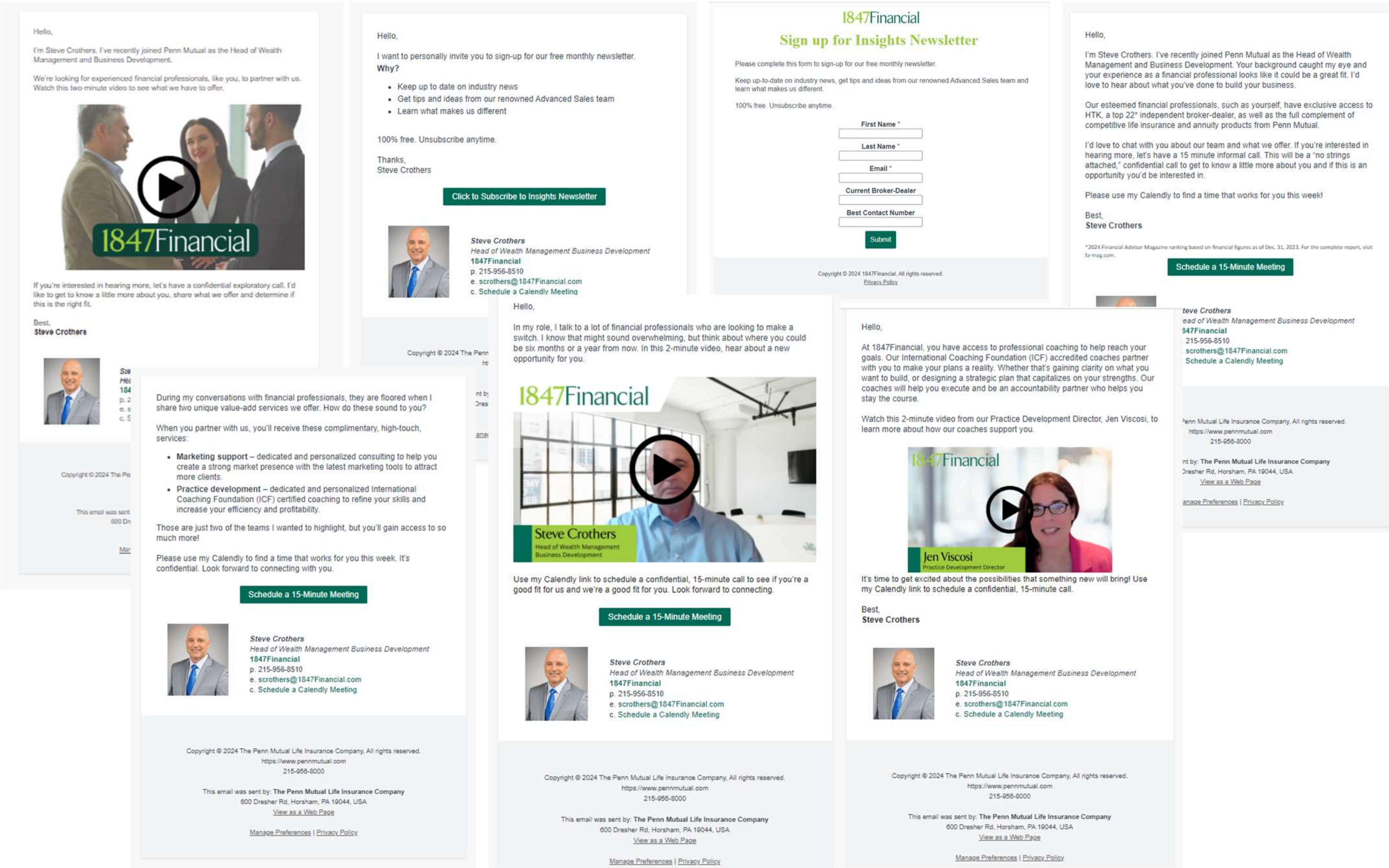
Messaging

- Friendly, casual, not highly branded
- **Highlight where we win:** dedicated marketing support and practice management consulting
- **Offers:** 1847Financial video, Steve video, Calendly link, sign-up monthly recruiting newsletter, recruiting symposium video(s)

Goals

- 7 "touches" – marketing rule of 7 before message is "received"
- Email open rates, click-through rates
- Get intro meetings
- Warm-up leads and send to firms


May 21
Tues. email week #1: 1847Financial video
#1a: If open, email to sign-up for recruiting newsletter (immediate)
NEWS
#1b: Receive newsletter from Steve
Use A/B Subject line testing in SFMC
Send weekly on Tues. a.m.
Follow-up emails; same or next day
Steve send Calendly appt. info to Diane, Jill each Mon.
May 28
Tues. email week #2: Steve's Calendly
Calendly
If open and click, meeting with Steve
#2a: If open, email re: mktg/practice mgt (next day, unless they click Calendly, then 2 hours)
June 4
Tues. email week #3: Steve video, Calendly
Remove names who signed up for Steve meeting
Calendly
If open and click, meeting with Steve
Steve begin calling reps who opened all three emails
June 11
Tues email week #4: Video from Jen/Practice Mgt., Calendly
Remove names who signed up for Steve meeting
Calendly
If open and click, meeting with Steve
Steve continue calling reps who opened three or more emails



Hello,

I'm Steve Crothers. I've recently joined Penn Mutual as the Head of Wealth Management and Business Development.

We're looking for experienced financial professionals, like you, to partner with us. Watch this two-minute video to see what we have to offer.

If you're interested in hearing more, let's have a confidential exploratory call. I'd like to get to know a little more about you, share what we offer and determine if this is the right fit.

Best,
Steve Crothers

Hello,

I want to personally invite you to sign-up for our free monthly newsletter.

Why?

- Keep up to date on industry news
- Get tips and ideas from our renowned Advanced Sales team
- Learn what makes us different

100% free. Unsubscribe anytime.

Thanks,
Steve Crothers

Click to Subscribe to Insights Newsletter

Steve Crothers
Head of Wealth Management Business Development
1847Financial
p. 215-956-8510
e. scrothers@1847Financial.com
c. Schedule a Calendly Meeting

1847Financial

Sign up for Insights Newsletter

Please complete this form to sign-up for our free monthly newsletter.

Keep up-to-date on industry news, get tips and ideas from our renowned Advanced Sales team and learn what makes us different.

100% free. Unsubscribe anytime.

First Name *

Last Name *

Email *

Current Broker-Dealer

Best Contact Number

Submit

Hello,

I'm Steve Crothers. I've recently joined Penn Mutual as the Head of Wealth Management and Business Development. Your background caught my eye and your experience as a financial professional looks like it could be a great fit. I'd love to hear about what you've done to build your business.

Our esteemed financial professionals, such as yourself, have exclusive access to HTK, a top 22* independent broker-dealer, as well as the full complement of competitive life insurance and annuity products from Penn Mutual.

I'd love to chat with you about our team and what we offer. If you're interested in hearing more, let's have a 15 minute informal call. This will be a "no strings attached," confidential call to get to know a little more about you and if this is an opportunity you'd be interested in.

Please use my Calendly to find a time that works for you this week!

Best,
Steve Crothers

*2024 Financial Advisor Magazine ranking based on financial figures as of Dec. 31, 2023. For the complete report, visit fa-mag.com.

Schedule a 15-Minute Meeting

During my conversations with financial professionals, they are floored when I share two unique value-add services we offer. How do these sound to you?

When you partner with us, you'll receive these complimentary, high-touch, services:

- **Marketing support** – dedicated and personalized consulting to help you create a strong market presence with the latest marketing tools to attract more clients.
- **Practice development** – dedicated and personalized International Coaching Foundation (ICF) certified coaching to refine your skills and increase your efficiency and profitability.

Those are just two of the teams I wanted to highlight, but you'll gain access to so much more!

Please use my Calendly to find a time that works for you this week. It's confidential. Look forward to connecting with you.

Schedule a 15-Minute Meeting

Steve Crothers
Head of Wealth Management Business Development
1847Financial
p. 215-956-8510
e. scrothers@1847Financial.com
c. Schedule a Calendly Meeting

Hello,

In my role, I talk to a lot of financial professionals who are looking to make a switch. I know that might sound overwhelming, but think about where you could be six months or a year from now. In this 2-minute video, hear about a new opportunity for you.

Use my Calendly link to schedule a confidential, 15-minute call to see if you're a good fit for us and we're a good fit for you. Look forward to connecting.

Schedule a 15-Minute Meeting

Steve Crothers
Head of Wealth Management Business Development
1847Financial
p. 215-956-8510
e. scrothers@1847Financial.com
c. Schedule a Calendly Meeting

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https://www.pennmutual.com
215-956-8000

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600 Dresher Rd, Horsham, PA 19044, USA
View as a Web Page

Manage Preferences | Privacy Policy

Hello,

At 1847Financial, you have access to professional coaching to help reach your goals. Our International Coaching Foundation (ICF) accredited coaches partner with you to make your plans a reality. Whether that's gaining clarity on what you want to build, or designing a strategic plan that capitalizes on your strengths. Our coaches will help you execute and be an accountability partner who helps you stay the course.

Watch this 2-minute video from our Practice Development Director, Jen Viscosi, to learn more about how our coaches support you.

It's time to get excited about the possibilities that something new will bring! Use my Calendly link to schedule a confidential, 15-minute call.

Best,
Steve Crothers

Steve Crothers
Head of Wealth Management Business Development
1847Financial
p. 215-956-8510
e. scrothers@1847Financial.com
c. Schedule a Calendly Meeting

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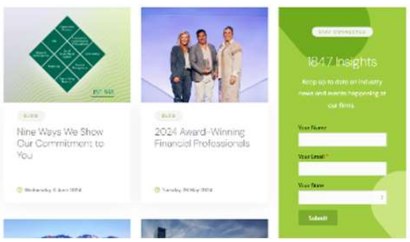
Results

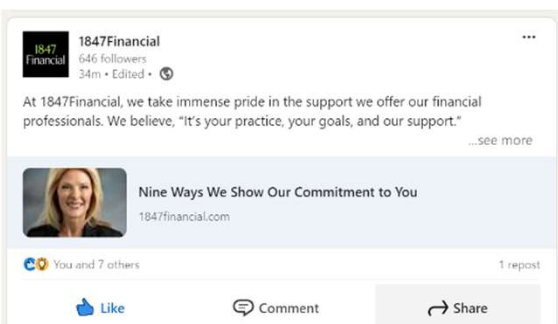
Campaign Performance						
Date	Email Sequence / Subject	Call to action	# sent	Open rate %	Total Clicks (Video, Newsletter, Calendly, 1847Website, etc.)	Call to action clicks (Calendly Link)
5/21/2024	Email 1.0a – Opportunity for you	Watch video	1,181	46%	9	0
	Email 1.0b - Your experience caught my eye	Watch video	680	41%	11	0
	Email 1.1 – Need ideas to grow your practice	Subscribe to newsletter	429	48%	2	2
	Email 1.2 – What lies ahead	Schedule meeting	2	100%	2	1
5/28/2024	Email 2.0 - Quick question: your experience	Schedule 15 minute meeting	1,815	49%	27	1
	Email 2.1 – Two ways we win	Schedule 15 minute meeting	1,802	33%	32	1
6/4/2024	Email 3.0 – Make a switch	Watch video & schedule meeting	1,776	49%	26	1
6/11/2024	Email 4.0 – Reach your goals with pro coaching	Watch video & schedule meeting	1,759	35%	12	3

Emails converted to phone calls results

Email	Opens	Open rate %
Email 1	267	14%
Email 2	320	17%
Email 3	537	29%
No clicks	755	40%
Grand Total	**1879**	**60% open rate**

Blog Series





BLOG

Wednesday, 5 June 2024

Nine Ways We Show Our Commitment to You

By Heather Nagengast, President of 1847Financial

As the leader of 1847Financial which now includes HTK, I take pride in the support we offer financial professionals.

1847Financial is Penn Mutual's and HTK's most closely affiliated distribution system that provides support for building strong and sustainable financial practices. We like to say, "It's your practice, your goals and our support."

Our vision is clear: to be the distribution network of choice for high performing, growth-oriented, independent financial professionals, capitalizing on the resources of both Penn Mutual and HTK, our trusted broker-dealer/RIA.

The core of our mission lies in the recruitment and retention of financial professionals, focused on growing their practices through top-tier products and customizable support.

Our allegiance to our financial professionals dates back to 1995, spanning nearly three decades. Through this time, we've remained steadfast in our commitment to their success and that of their clients. We strive to provide industry-leading capabilities and unparalleled expertise while fostering deep and meaningful relationships between financial professionals and our teams.

I'm thrilled to announce a new blog series, shining a spotlight on our unwavering financial professional value commitment. In the coming months, we'll delve into the "Nine Diamonds," each representing a facet of this enduring commitment. These diamonds are integral to Penn Mutual and 1847Financial embodies them day in and day out.

Stay tuned as we explore how this commitment shapes our approach. In the meantime, here's a sneak peek at what's to come:

Competitive Products – Competitive life insurance, annuities, investments and securities through Penn Mutual and HTK

HTK – A top 25* b-d

Competitive Compensation & Recognition – Opportunities for growth, recognition and connection, including competitive compensation

Advanced Sales – Dedicated team to assist with business, estate, charitable, retirement and tax planning

Local Leadership & Support – Local firms with unique cultures and specialties

Underwriting – Access to ACE, a fully digital platform to purchase life insurance

Marketing – Dedicated and personalized consulting to help you create a strong market presence with the latest marketing tools to attract more clients

Practice Management – Dedicated and personalized coaching to refine your skills and increase your efficiency and profitability

Ease of Doing Business – Technology tools for marketing and managing your business

Stay tuned as we delve deeper into each of these areas and explore how they enhance your professional journey.

*2024 Financial Advisor Magazine ranking based on financial figures as of Dec. 31, 2023. For the complete report, visit fa-mag.com.

6659272RG_May26

Blog Series

BLOG

Delivering Choice and Confidence: Our Product Philosophy

Wednesday, 12 June 2024

BLOG

Wednesday, 12 June 2024

Delivering Choice and Confidence: Our Product Philosophy

By: Ray Caucci, Chief Product Officer

Welcome to the first installment of our 9-part series showcasing Penn Mutual's unwavering commitment to financial professionals and how 1847Financial brings these promises to life. Each "Diamond" in the series represents a different aspect of this commitment.

In the dynamic landscape of financial services, choosing the right products for clients can be a daunting task. However, at 1847Financial and Penn Mutual, we've crafted a product philosophy that focuses on simplicity, transparency and guarantees, so you can have confidence in the solutions you offer.

Competitive, Diverse Offerings for Tailored Solutions

Central to our philosophy is to offer of a broad spectrum of top-tier products. Whether it's our current 12 life insurance or five annuity products, we strive to be in the top three competitive products in each market segment. This ensures that you have options to tailor solutions that match the unique facts, circumstances and needs of your clients.

Simplicity, Transparency, and Guarantees

Our product designs prioritize the principles of simplicity, transparency and guarantees. We strive to ensure that our products deliver performance as close as possible to the expectations set at the time of sale. When we are managing non-guaranteed elements like credited interest rates, our goal is to maintain consistency in treatment for both new and existing policyholders.

Extensive Support for Financial Professionals

Our 1847Financial channel offers many support options from dedicated product wholesalers to provide training and design support to an internal sales desk ready to address any product-related questions or provide illustrations. We're committed to help you navigate our product offerings with confidence and ease.

Backed by Unwavering Strength

In the end, products are promises. Promises that are supported by consistently strong financial ratings. We take pride in our ratings. With an 'A+' rating from A.M. Best, Penn Mutual is the only life company to have maintained an 'A' or better rating from A.M. Best for the past 97 years. And, our Comdex rating further solidifies our strength. The Comdex rating, a composite of all ratings received by a company, represents the average percentile of those ratings. With a Penn Mutual Comdex rating of 93, we stand tall, with 93 percent of companies in the industry rated the same or lower than us.

With 1847Financial, you can rest assured that you're not just getting products; you're getting choice, confidence and support every step of the way.

Blog Series

Coordinated with content for home office associates, tied to business plan/strategy

Penn Mutual | THE CUBE FOR EMPLOYEES Our Culture My Career Who Does What Teams Newsroom Brand Central

Our 2024 Business Plan › Business Plan updates ›

Dive into the 9 Diamonds: Competitive Products

Published on June 12, 2024 | 118 views

Raymond Caucci | Head of Product and Underwriting

Discover how our product team is delivering top-tier products that focus on simplicity, transparency and guarantees.

We're excited to introduce a new series to help you learn more about how employee contributions are helping us deliver on the Value Commitment to our customer, the Financial Professional. We'll continue to highlight the "Nine Diamonds" that together make our Financial Professional Value Commitment over the next few months. With each story, we invite you to answer a quiz question. After each story, we'll randomly select one respondent to win ***10 Penn Mutual Rewards*** *points. If you participate in all nine stories, you'll have a chance to win* ***90 Penn Mutual Rewards*** *points at the end of the series.*

For Financial Professionals, choosing the right products for clients can be a daunting task. At Penn Mutual, our product designs prioritize the principles of simplicity, transparency and guarantees, so that Financial Professionals can have confidence in the solutions they offer.

Kensy, Stephanie | Hartmann, Jill; Hamm, Mike; Campbell, Nicole; Ramirez, Sunshine 9:58 AM

9 Diamonds first story up

You replied to this message on 6/12/2024 12:31 PM.

Hi Jill – Thank you for your collaboration on the new 9 Diamonds series. The first story is now published on The Cube!
https://thecube.pennmutual.com/business_plan/business_plan_updates/dive_into_the_9_diamonds_competitive_products

Great example of enterprise comms in action- and opportunity to highlight parts of the business on The Cube. Looking forward to continued partnership on this series and we will keep you all posted on engagement from employees on the quizzes, etc.

Best,

Stephanie Kensy • Director, Enterprise Communications
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p. 215-956-8337
a. 600 Dresher Road, Horsham, PA 19044
w. pennmutual.com • gateway.pennmutual.com

Competitive, Diverse Offerings for Tailored Solutions

Whether it's our current 12 life insurance or five annuity products, we strive to be in the top three competitive products in each market segment. Continuing to advance our competitive product lineup is part of our 2024 Business Plan. This ensures that Financial Professionals have options to tailor solutions that match the unique facts, circumstances and needs of their clients.

Our competitive analysis team has access to a variety of publicly available information sources on competitor offerings, including policy forms filings, prospectuses, marketing materials and sample illustrations. In addition, they receive direct feedback on product competitiveness from Financial Professionals, Strategic Alliance partners and field-facing employees. The team produces monthly reports outlining our competitive positions and a summary of competitor actions across each of our product lines.

Focus on Performance

We strive to ensure that our products deliver performance as close as possible to the expectations set at the time of sale. When we are managing non-guaranteed elements like credited interest rates, our goal is to maintain consistency in treatment for both new and existing policyholders.

Extensive Support

Every day with the help of regional vice presidents, regional marketing directors, case designers, product wholesalers and internal sales desk personnel, we are helping Financial Professionals navigate our product offerings with confidence and ease.

"The breadth of the Penn Mutual product portfolio allows me, as a wholesaler, to support Financial Professionals and their clients and find tailored life insurance and annuity solutions that fit their goals and unique situations," says Jeff Borrowman, Head of Sales Development - Wholesaling & Sales Desk. "Having competitive products in all of the major categories allows the goal to drive the solution, rather than just pushing a product."

Backed by Unwavering Strength

Life insurance products are promises. Promises that are supported by consistently strong financial ratings. We take pride in our ratings. With an 'A+' rating from AM Best, Penn Mutual is the only life company to have maintained an 'A' or better rating from AM Best for the past 97 years. And, our Comdex rating further solidifies our strength. The Comdex rating, a composite of all ratings received by a company, represents the average percentile of those ratings. With a Penn Mutual Comdex rating of 93, we stand tall, with 93 percent of companies in the industry rated the same or lower than us.

We should all be proud of the products we deliver and the promises we keep to our Financial Professionals and policyholders.

QUIZ: Which of the following products is NOT currently part of our life insurance product portfolio?

A. Protection Whole Life

B. Indexed Universal Life

C. Broad Convertible Term Life

D. Survivorship Protection Variable Universal Life

Submit your response to Corporate Communications by **Friday, June 21** for a chance to win **10 Penn Mutual Rewards points**. Look for the answer in our next story on the Nine Diamonds, coming week of June 24 .

Emails

June 2024

1847Financial

Product Pulse

Wholesaler updates to help grow your business

Dedicated to Keeping You Informed

Welcome to the June edition of Product Pulse, your go-to source for the latest updates and news from 1847Financial. I'll recap stories you don't want to miss and ensure you're equipped with the information you need to support your clients. Thanks for reading!

Premium Deposit Fund Availability on PVUL & SPVUL

Premium deposit fund is available with Protection VUL and Survivorship Protection VUL products on June 1.

Learn More

Reminder: DCA and PDF Interest Rates Increased May 1

Don't forget to check out the new rates and see how they can benefit your clients.

Learn More

We Thought You Should Know

Reminder: Update to Premium Financing Requirements June 1

New minimum net worth amount going into effect for premium financing cases using early cash value riders.
Learn More

New Gateway Enhancements Now Live

Based on your feedback, we're making it easier for you to access tools and navigate the site.
Learn More

The Business Owner Waterfall

Explore the four pillars of business planning and life insurance with VP of Advanced Sales, Bill Bell.
Learn More

Business Building Resources

Looking for the latest updates from us?

Click here to follow us on LinkedIn and be the first to know!

1847Financial

Monthly Marketing and Advanced Sales Insights

Enhance your practice with Penn Mutual's Advanced Sales Team, offering over 120 years of combined expertise in life insurance, annuities, estate planning, tax optimization, and risk management.

Stay ahead of trends with personalized strategies and innovative solutions.

Learn more and meet the team.

Upcoming Events

CPE Approved Webinar for your Centers of Influence (COIs)
Tuesday, June 11
2:00 p.m. ET

Presented by Bill Bell, JD, MBA Vice President, Advanced Sales, The Penn Mutual Life Insurance Company and Mark Heppenstall, CFA CIO & President, Penn Mutual Asset Management

Economic and Market Trends Impacting Financial Professionals

- Who Should Attend: Financial professionals, accountants, attorneys, property & casualty professionals, and staff welcome
- CE Credit Available to your COIs with the CPE, CPA, CLU, ChFC, and CFP designations (this webinar does not qualify for state license CE credit).
- In order to be awarded full credit hours, you must be present, registering your attendance and departure and answer all polling questions.

Please use this link to register, as well as feel free to forward this registration link to the CPA/CPE/CLU/ChFC/CFPs in your network.

Your 1847Financial Team

Dedicated home office contacts at your fingertips.

Meet Your Team

Jon Ernst, External Life Wholesaler
Direct: 402-310-2221
Email: Ernst.Jon@pennmutual.com

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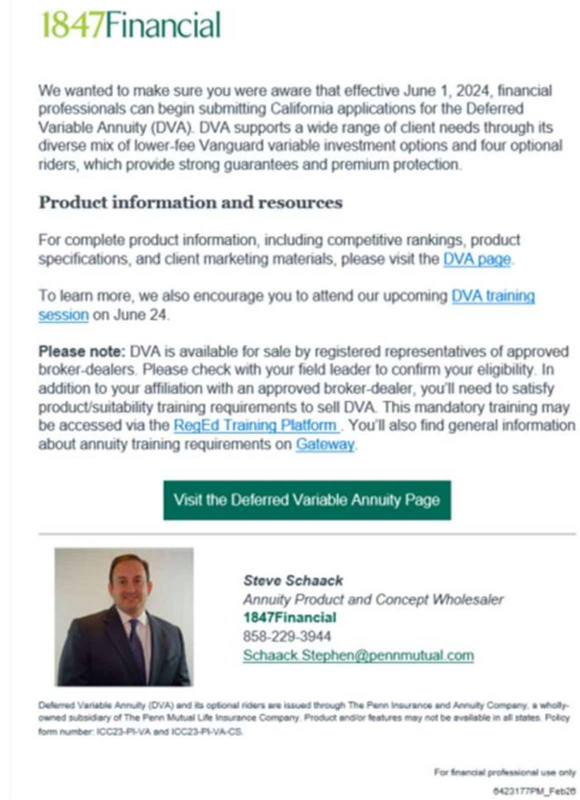
https://www.pennmutual.com
215-956-8000



1847Financial

We wanted to make sure you were aware that effective June 1, 2024, financial professionals can begin submitting California applications for the Deferred Variable Annuity (DVA). DVA supports a wide range of client needs through its diverse mix of lower-fee Vanguard variable investment options and four optional riders, which provide strong guarantees and premium protection.

Product information and resources

For complete product information, including competitive rankings, product specifications, and client marketing materials, please visit the DVA page.

To learn more, we also encourage you to attend our upcoming DVA training session on June 24.

Please note: DVA is available for sale by registered representatives of approved broker-dealers. Please check with your field leader to confirm your eligibility. In addition to your affiliation with an approved broker-dealer, you'll need to satisfy product/suitability training requirements to sell DVA. This mandatory training may be accessed via the RegEd Training Platform. You'll also find general information about annuity training requirements on Gateway.

Visit the Deferred Variable Annuity Page

Steve Schaack
Annuity Product and Concept Wholesaler
1847Financial
858-229-3944
Schaack.Stephen@pennmutual.com

Deferred Variable Annuity (DVA) and its optional riders are issued through The Penn Insurance and Annuity Company, a wholly-owned subsidiary of The Penn Mutual Life Insurance Company. Product and/or features may not be available in all states. Policy form number: ICC23-PI-VA and ICC23-PI-VA-CS.

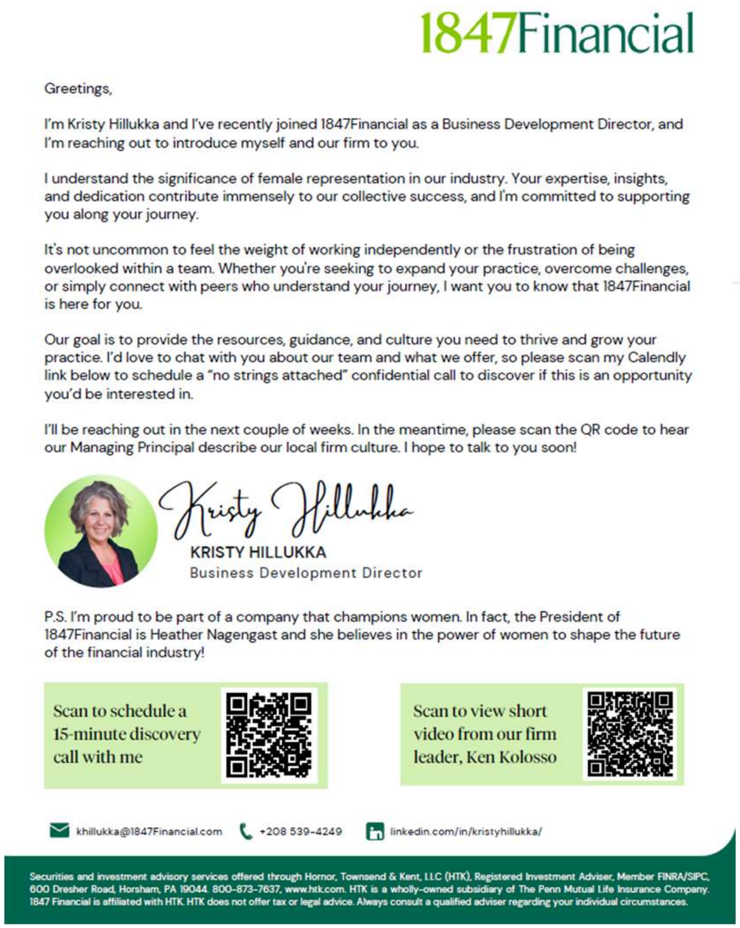
For financial professional use only
6423177PM_Feb26

Marketing Calendar

2024 Field Marketing Calendar - Recruiting, FP Support, Interdepartment Support

	Q1 2024			Q2 2024			Q3 2024			Q4 2024		
	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
RECRUITING												
1847Financial Key Events	1/20 - Forum 400 1/23-1/24 - Lewis Kickoff 1/26 - Kolosso Kickoff Field Leader Meeting 1/29-31 | Miami, FL	2/1-2/2 - Parks Kickoff 2/5-2/6 - Houston Kickoff 2/7-2/8 - Utah Kickoff 2/7 - NJ firm meeting 2/16- Peck kickoff	Q 1847Financial Town Hall (Nagengast) Premium Finance Conf - 2/17-2/19	Recruiting Symposium April 30 STAR Study Group (Nagengast only) April 3-5 | Nashville, TN Kolosso Firm Event April 18-19 Peck - Pinnacle April 26-28	Royal Blue 5/7-11 Golden Eagle 5/13-17 UT Firm Marketing Bootcamp May 21-22	Q 1847 Townhall (Nagengast) June 25 Barrett - Firm event, Advanced Sales & Marketing 6/26	Recruiting Symposium Inaugural Immersion	Monthly Immersion Sarver Firm Symposium, Pittsburgh, PA Aug 14-15 Peck Pinnacle, Austin TX Aug 26-28	Q 1847Financial Town Hall (Nagengast) Leap Academy 9/9-10 Las Vegas, NV Monthly Immersion) HTK Discover 9/23-9/25	Recruiting Symposium Monthly Immersion Managing Principal Meeting Dallas, TX	Monthly Immersion	Q 1847Financial Town Hall (Nagengast)
Industry Events (promote attendance, event recap)	FINSECA FORUM 400 1/20-23 Orlando, FL	NAPFA Large Firm Forum 2/19-21 Scottsdale, AZ	NAIFA/LAMP 3/17-19 Denver, CO		NAPFA Spring National Conference 5/8-11 Fort Worth, TX NAIFA Congressional Grassroots Advocacy 5/20-21 FINSECA Advanced Markets 5/22-24 Washington D.C.				FPA Annual Conference 9/18-20 Columbus, OH NAIFA Apex 9/19-21 Phoenix, AZ	WIFS National Conference 10/14-16 Philly Managing Principals Meeting 10/21-10/23 Dallas, TX NAPFA Fall National Conference 10/30-11/2 Nashville, TN		
Recruiter Network Agenda	• New Year Message from Heather • Featured Speakers: Brian S. & Rosie K. • Recruiting News & Announcements • Guest Speaker - Michael Kane	• Field Leader Conference Key Takeaways • Guest Speakers: Brian Strasser and Rosie Keller • 2024 Total Rewards Brochure Update • Guest Speaker: Managing Principal, Dewane Lewis • Penn Mutual Referral Bonus • Recruiting News & Announcements	• New Member Intro - Steve Crothers, Head of Wealth Management, Business Development • Breakout Activity • Celebrating Wins	• 1847Financial vision and mission • Recruiting news and updates • Breakout groups • Recruiting symposium update	• Recruiting goals & updates • 1847Financial Story presentation review (Hamm) • Breakout sessions	• Spotlight on Michael Kane / Home office resources						
Marketing Materials, Guides, Flyers	Total Rewards Brochure	Firm Support Guides	1847Financial Support Guide	1847Financial Story 1847Financial Brand Guide								
1847Financial.com functionality	Website Phase II	News and Insights Choose Your Path			Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)	Find a FP Tool (monthly updates)
1847Financial News & Insights articles/blogs	• 1/9 - FP's new year resolutions • 1/15 - Peck holiday party	• 2/1 - Kolossal Kickoff • 2/5 Field Leadership Meeting • 2/5 - Parks kickoff • 2/8 - Houston Kickoff • 2/9 - NJ kickoff • 2/12 Bill Bell Blog - tax risk • 2/13 - Lewis kickoff • 2/15 - Utah Kickoff • 2/26 - Crothers Welcome • 2/26 - Dallas kickoff	• 3/4 - Nagengast women's history month • 3/7 Trailblazers - WHM • 3/11 - Davis / American College board • 3/12 - Dallas Leap Day recap • 3/26 Eddie Knight 15 year anniversary • 3/28 - Nashville offering business valuations to clients	• 4/1 - Join 1847Financial at Finseca Advanced Markets • 4/8 Peck blog: Tax diversification • 4/15 - HTK top 25 B/D announcement • 4/17 1847 commitment to FPs • 4/22 - Utah community service project	• 5/3 - Oklahoma service event • 5/3 - Bill Bell - dont cut the threads • 5/8 - Welcome Paul Rodden • 5/13 - your vision, your goals, our support • 5/16 - Peck hosts NAIFA / Dallas Summit • 5/17 - Bill Bell - business owner waterfall • 5/24 - Nashville Moves • 5/27 - Utah shares culture and core values • 5/28 - Spotlight on Ravin and Bill as award winners							
Recruiting Campaigns	Osaic (MPs) LF MML	Osaic PM	PM Mutual of Omaha	Osaic PM Mutual of Omaha	AUM-based broker-dealer (Crothers)	AUM-based broker-dealer (Crothers)						
Social Media Amplification	Firm Kick-off Recap Blog Promo	Firm Kick-off Recap Blog Promo	Firm Kick-off Recap Recruiting Symposium Promo Blog Promo	Blog Promo	Blog Promo	Royal Blue/Golden Eagle wrap up Recruiting Symposium Promo Blog Promo	Blog Promo	Blog Promo	Recruiting Symposium Promo Blog Promo	Blog Promo	Blog Promo	Blog Promo
LinkedIn Followers	2	90	262	392	585							
1847Financial Insights email newsletter (recruiting)	3 Firms 930 Sends 50.5% Avg Open	5 Firms 2,269 Sends 42% Avg Open	5 Firms 2,123 Sends 31.4% Avg Open	6 Firms 2,307 Sends 44.5% Avg Open	x Firms xxxx Sends xx% Avg Open 232 via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn	x Firms xxxx Sends xx% Avg Open xxx via LinkedIn
INTERDEPARTMENT MARKETING SUPPORT												
Key Iniatives	Email Hosting Transition off DBAs Adopt 1847 DBA		1847Financial Simplified Contract (staggered by MP)	1847Financial Simplified Contract (staggered by MP)	Launch Video Editing Service	Social media cleanup (remove "formerly known as" references)						
Enterprise Comms					FP of the year awards (Ruvin, Bill)							
Practice Development, Transformation, Transition (Muller)		Practice Management Flyer	Succession Planning emails			Technology flyers						
Wholesaler/IMR (Borrowman)					FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse	FP email from Wholesalers - Product Pulse
LEAP (Wiesner)					Content Creation - Blog Post				Leap Event - Vegas			
Advanced Sales (Gabby)												
	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
FINANCIAL PROFESSIONAL SUPPORT												
Content Focus	Financial Wellness Month	Financial Mistakes	Credit and Your Finances	Retirement Planning	Business Owner Retirement Planning	Beneficiary Review	Budgeting/Debt Management	College Planning	Protection Planning / LIAM	Investment Solutions, Estate Planning Awareness	Financial Milestones	Planning Your Financial Goals
Content, Campaigns, etc.	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts	Monthly email, social, video scripts
Content Central	Launch Campaign - Personal Coverage Review Launch Campaign - 2nd Generation Intro	Launch Campaign - Annual Review	User review/clean-up Automated newsletter for HTK reps.	Launch Campaign - Beneficiary Review 1847Financial Branding Content			Launch Campaign TBD			Launch Campaign TBD		
Marketing Tri-Council	Advanced Sales podcast / blog	Gabby's calendar & content	Gateway planning	Trending now email format, discussed you tube video channel (Gabby)	Gateway demo & expired content							

Recruiting Content/Videos, etc.


1847Financial

Greetings,

I'm Kristy Hillukka and I've recently joined 1847Financial as a Business Development Director, and I'm reaching out to introduce myself and our firm to you.

I understand the significance of female representation in our industry. Your expertise, insights, and dedication contribute immensely to our collective success, and I'm committed to supporting you along your journey.

It's not uncommon to feel the weight of working independently or the frustration of being overlooked within a team. Whether you're seeking to expand your practice, overcome challenges, or simply connect with peers who understand your journey, I want you to know that 1847Financial is here for you.

Our goal is to provide the resources, guidance, and culture you need to thrive and grow your practice. I'd love to chat with you about our team and what we offer, so please scan my Calendly link below to schedule a "no strings attached" confidential call to discover if this is an opportunity you'd be interested in.

I'll be reaching out in the next couple of weeks. In the meantime, please scan the QR code to hear our Managing Principal describe our local firm culture. I hope to talk to you soon!

Kristy Hillukka

KRISTY HILLUKKA
Business Development Director

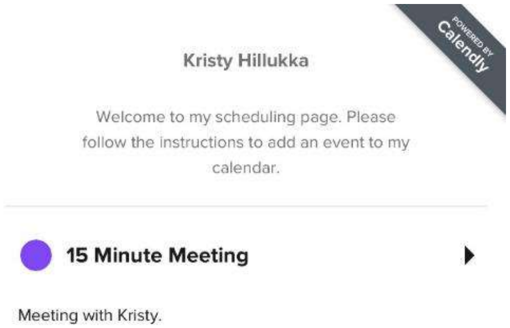
P.S. I'm proud to be part of a company that champions women. In fact, the President of 1847Financial is Heather Nagengast and she believes in the power of women to shape the future of the financial industry!

Scan to schedule a 15-minute discovery call with me

Scan to view short video from our firm leader, Ken Kolosso

khillukka@1847Financial.com +208 539-4249 linkedin.com/in/kristyhillukka/

Securities and investment advisory services offered through Hornor, Townsend & Kent, LLC (HTK), Registered Investment Adviser, Member FINRA/SIPC, 600 Dresher Road, Horsham, PA 19044. 800-873-7637, www.htk.com. HTK is a wholly-owned subsidiary of The Penn Mutual Life Insurance Company. 1847 Financial is affiliated with HTK. HTK does not offer tax or legal advice. Always consult a qualified adviser regarding your individual circumstances.



Communication/Project Planning and Tracking

A	B	C	D	E	F	G	H	I	J	K
Wholesaler Monthly email schedule										
Product Pulse										
Email sent through Marketing Cloud to AFFL contracted financial professionals with 1847Financial only - under email signature for the life wholesaler in their region										
2024	Content rcvd. From Alexa's team	Jill edit, create graphics	Diane build email; verify lists	Jeff review content and approve	Diane send advance notice	Diane send	Reporting to Jeff (Fri./Mon. following send)	Notes re: topics	Total unique open rate	Popular clicks
May	04/30/24	1 day	1 day	1 day	1-2 days	May 7	May 10/13		53.3%	Premium Financing Term Pricing
June	05/31/24	1 day	1 day	1 day	1-2 days	June 10	June 14/17	CE event June 11; FDD June 17 Follow 1847 LinkedIn		
July	06/28/24	1 day	1 day	1 day	1-2 days	July 8	July 12/15			
Aug	07/30/24	1 day	1 day	1 day	1-2 days	Aug. 9	Aug 16/19			
Sept	08/30/24	1 day	1 day	1 day	1-2 days	Sept. 9	Sept. 13/16			
Oct	09/30/24	1 day	1 day	1 day	1-2 days	Oct. 8	Oct. 11/14			
Nov	10/31/24	1 day	1 day	1 day	1-2 days	Nov. 11	Nov. 15/18			
Dec	11/29/24	1 day	1 day	1 day	1-2 days	Dec. 9	Dec. 13/16			

Positive Feedback

Kolosso, Ken | Hartmann, Jill; Hamm, Mike; Provezis, Amy | Mon 7:13

Note to Jill

You replied to this message on 6/11/2024 8:05 AM.

Hi Jill –

I don't believe we have met yet, but wanted to follow up to Amy's message and thank you for the great work you did in adding the P.S. with the Heather quote as well as all the aesthetics! It turned out fantastic! Thank you again for doing a fantastic job!

Ken Kolosso, MBA, ChFC, CLU • Managing Principal, 1847Financial
The Penn Mutual Life Insurance Company
1847Financial

e. kkolosso@1847financial.com
c. 248-207-6084

1. REBECCA FOSTER
Updated at Jun 07, 2024

Submission Date
Jun 7, 2024

Name
REBECCA FOSTER

On a scale from 1-10, how likely are you to refer Jill Hartmann's coaching to a colleague?
10 / 10

Overall, were you satisfied with the quality of this coaching?
Yes

Please provide any feedback from your session here:
JILL WAS GREAT!

2. jun juguilon
Updated at May 17, 2024

Submission Date
May 17, 2024

Name
jun juguilon

On a scale from 1-10, how likely are you to refer Jill Hartmann's coaching to a colleague?
10 / 10

Overall, were you satisfied with the quality of this coaching?
Yes

Please provide any feedback from your session here:
she was very patient with me for being a non technical person

Ghostwriting - Blog

leap
Community Blog

Search...

27 minutes ago · 3 min read

The Fundamentals of Leap: A Guide for Financial Professionals

With Lucian Ioja, ORIS Wealth Designs, LLC

In the dynamic world of financial services, staying ahead of the curve is not just an advantage; it's a necessity. Recently, financial professionals had the privilege to gain insights from **Lucian Ioja**, a seasoned expert in the Leap community, during a training webinar. Lucian joined the insurance industry in 1998 and he found the training to be lacking until he discovered the Leap system. He is the Founder of **ORIS Wealth Designs, LLC** in Southlake, TX.

The Essence of Leap

For those unfamiliar, Leap stands for Lifetime Economic Acceleration Process, a comprehensive process that encourages a holistic approach to managing finances through various stages of one's financial life. Lucian emphasized the significance of fundamentals in any professional endeavor, drawing parallels between sports, mathematics, and financial strategies. This perspective laid the foundation for discussing Leap's integral components.

Leap's Transformative Impact

Leap's methodology doesn't just offer a different way to view finances; it provides a complete paradigm shift away from traditional financial planning. The focus moves from mere numbers to a holistic view of an individual's economic life. This approach allows financial professionals to offer more comprehensive advice that aligns with their clients' life goals and aspirations.

> "Protection, to me, is very important. It's at the base of everything that we're doing."
>
> Lucian Ioja
>
> Financial Professional Founder - ORIS Wealth Designs, LLC

An Example: Maximum Financial Potential

Navigating the path to financial security can feel like attempting to solve a complex puzzle with scattered pieces. However, there is a structured framework that can help guide clients. The 5-Level Pyramid of Protection, Savings, Safe Investments, Growth Investments, and Speculative Investments is a framework to help your clients achieve maximum financial potential, in other words, achieve the maximum benefits plus the maximum money supply.

Level 1: Protection

At the base of the pyramid is protection, the cornerstone of any solid financial plan. Just as a sturdy foundation supports a building, protection shields individuals from unforeseen events that could derail their financial journey. Whether it's taxes, fluctuating interest rates, or stock market volatility, premature death or disability, the road to financial success is fraught with obstacles. However, with adequate protection measures in place, such as insurance and risk management strategies, individuals can mitigate potential losses and safeguard their assets against the unpredictable.

Level 2: Savings

Moving up the pyramid is savings. Savings provide individuals with the liquidity needed to seize opportunities, weather emergencies, and attain peace of mind. Whether it's setting aside funds for future endeavors or creating a safety net for unexpected expenses, cultivating a habit of saving is paramount to ensure financial resilience and flexibility.

Level 3: Safe Investments

Ascending further, we reach safe investments. Here, the emphasis is on preserving capital and generating modest returns with minimal risk. While safe investments may not yield astronomical gains, they provide stability and security, serving as a defense against market downturns and economic uncertainties. Bonds, certificates of deposit (CDs), and high-yield savings accounts are common examples of safe investment vehicles.

Level 4: Growth Investments

Continuing our ascent, we arrive at growth investments. Unlike safe investments, which prioritize stability, growth investments are geared towards capital appreciation and long-term wealth accumulation. Equities, mutual funds, and real estate are typical avenues for pursuing growth-oriented strategies, albeit with higher levels of risk. While volatility and market fluctuations are inherent to growth investments, they offer the potential for substantial returns over time, provided individuals adopt a prudent and diversified approach.

Level 5: Speculative Investments

At the top of the pyramid lies speculative investments. Speculative investments encompass ventures with uncertain outcomes and significant volatility, such as cryptocurrencies, startups, and commodities trading. While speculative investments hold the allure of exponential gains, they also entail the possibility of substantial losses. Therefore, individuals should approach speculative ventures with caution, conducting thorough research and exercising restraint.

Conclusion: Maximizing Financial Potential

In conclusion, the 5-Level Pyramid of Protection, Savings, Safe Investments, Growth Investments, and Speculative Investments, used in conjunction with the Leap Model, offers a structured roadmap for navigating the complexities of personal finance. By adhering to this framework and embracing the principles of prudent risk management and disciplined planning, individuals can embark on a journey towards financial stability and realize their maximum financial potential. Remember, the key to success lies not only in reaching the summit but also in laying a solid foundation that withstands the trials and tribulations along the way.

Final Thoughts

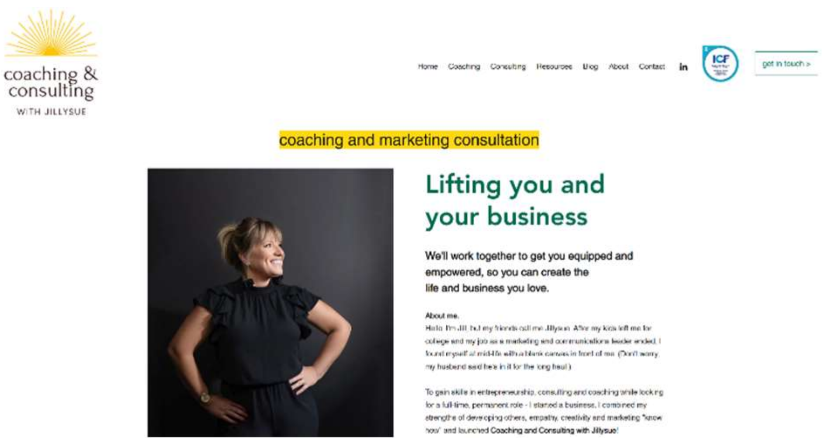
By placing a strong emphasis on foundational principles, Lucian has reinvigorated a sense of purpose and direction in the financial industry. For financial professionals striving to make a meaningful impact in their field, the Leap system offers a shift in perspective from transactional interactions to building enduring, value-driven relationships with clients.

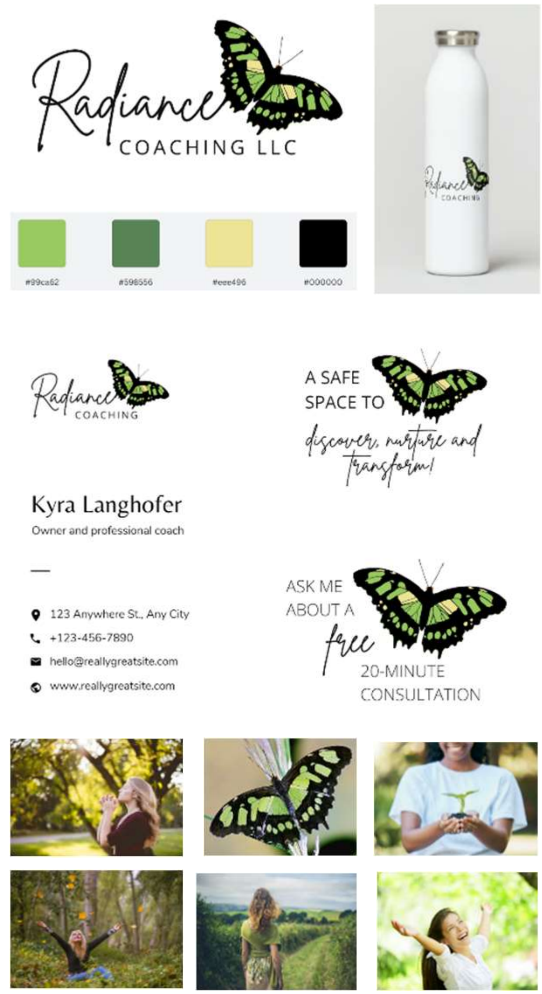
- If you're a Leap subscriber, view Lucian's 60 min. webinar here.
- If you want to learn more about Leap, sign-up for our newsletter here.
- Ready to sign-up for Leap? View subscription info here.

13 views

BRANDING, LOGOS, FLIERS, SOCIAL MEDIA GRAPHICS

- Used Canva and Wix to create my logo and website at https://www.jillysue.com (below) for coaching and marketing consultation
- Developed brand questionnaire to gather info on strategy, audience, value proposition, voice, colors and images. Then, used Canva to create logos, fliers, social media graphics, business cards, etc. (right)
- I also provided website consultation and social media plans for business development for several clients

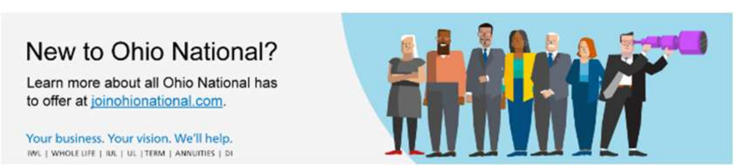


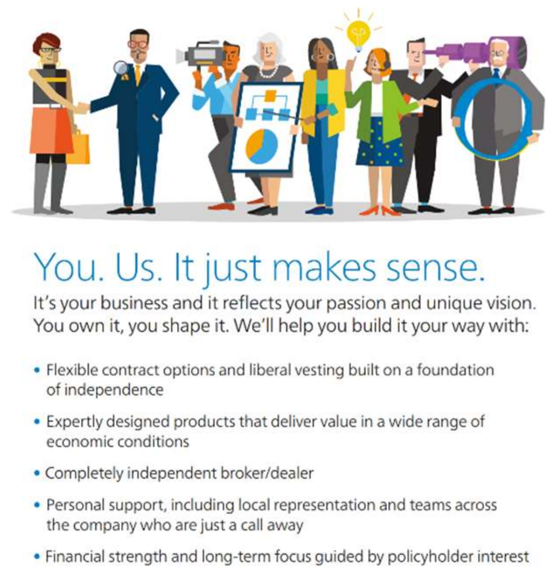


INDUSTRY ADVERTISING CAMPAIGN

- Purpose of campaign was to attract financials professionals and provide leads to recruiters; this multi-channel campaign led to 120% increase in leads
- Worked with distribution leadership to develop value proposition and tagline: **Your business. Your vision. We'll help.®**
- Used print and digital industry ads, thought leadership articles, event attendance (MDRT, NAIFA, WIFS, etc.), emails, social media, videos and more to direct prospects to https://www.joinohionational.com
- Leads were nurtured via email journeys. Once leads were "warm," they were passed to a recruiter

Please note: Since Ohio National was acquired by AuguStar, some website content may no longer be accessible or may have changed





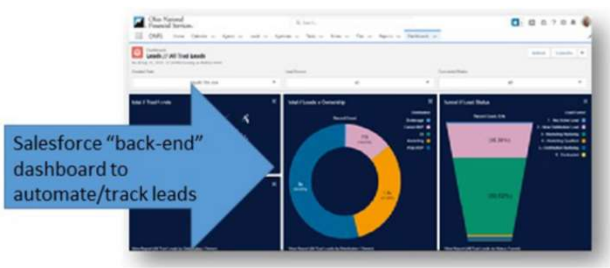
Marketing
Ohio National

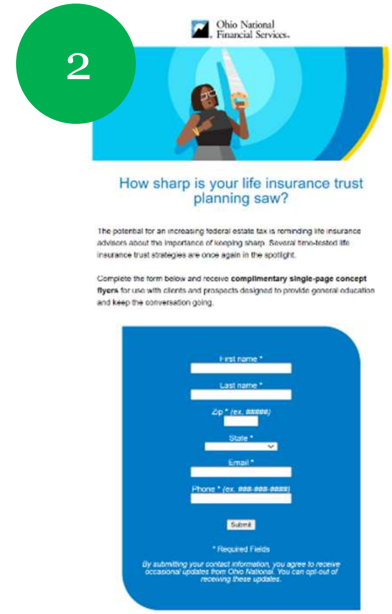
INDUSTRY ADVERTISING CAMPAIGN, CONTINUED

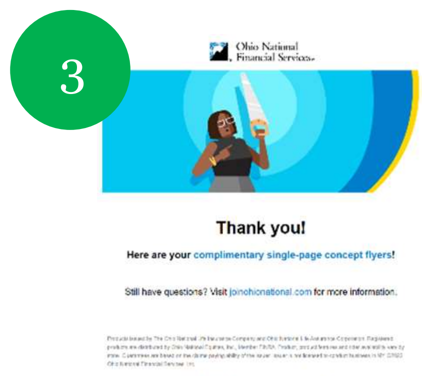
Here's a sample ad journey

1. Industry ad with QR code
2. Landing page to collect info
3. "Thank you" page with link to offer
4. Offer (sales idea); offer also emailed

Then, the email address was subscribed in Salesforce Marketing Cloud and received additional email content







Marketing
Ohio National

INDUSTRY ADVERTISING CAMPAIGN, CONTINUED

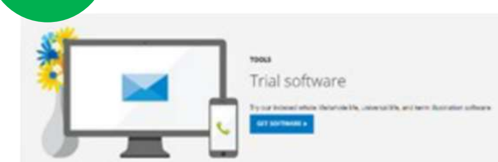
Here's another sample of how leads were collected

1. Recruiting website at https://www.joinohionational.com; site was promoted in many channels and by our recruiters
2. Offer of free trial software
3. Form to collect contact info

Please note: Since Ohio National was acquired by AuguStar, some website content may no longer be accessible or may have changed

1

2



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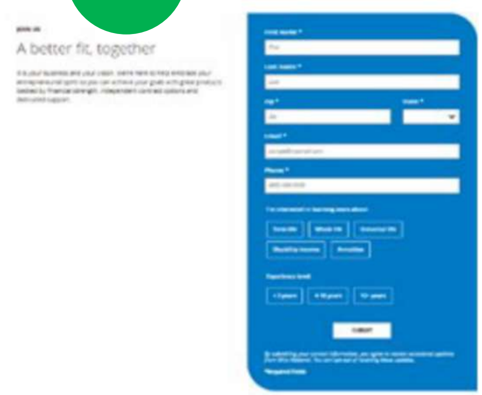
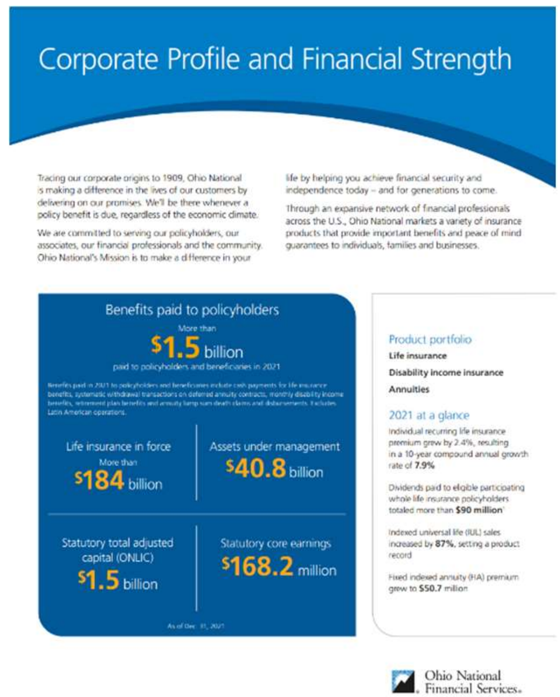
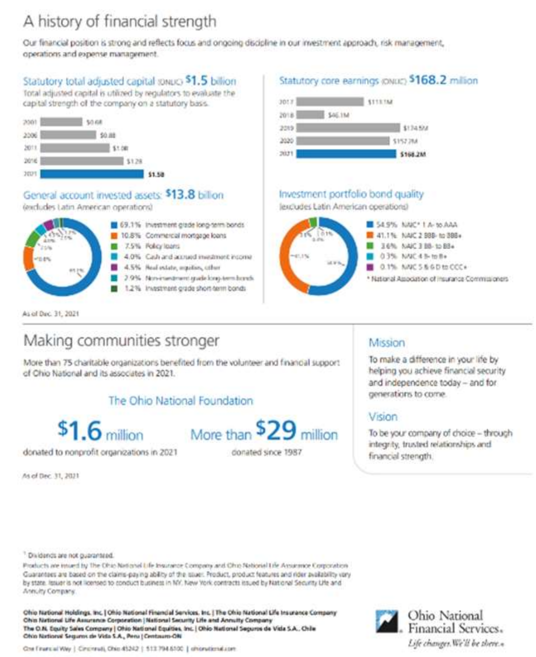


Marketing
Ohio National

CORPORATE PROFILE AND FINANCIAL STRENGTH

- Created 1-page flier to supplement (a much longer) annual report
- Financial professionals asked for a "quick glance" at Ohio National's financials that they could share with their clients





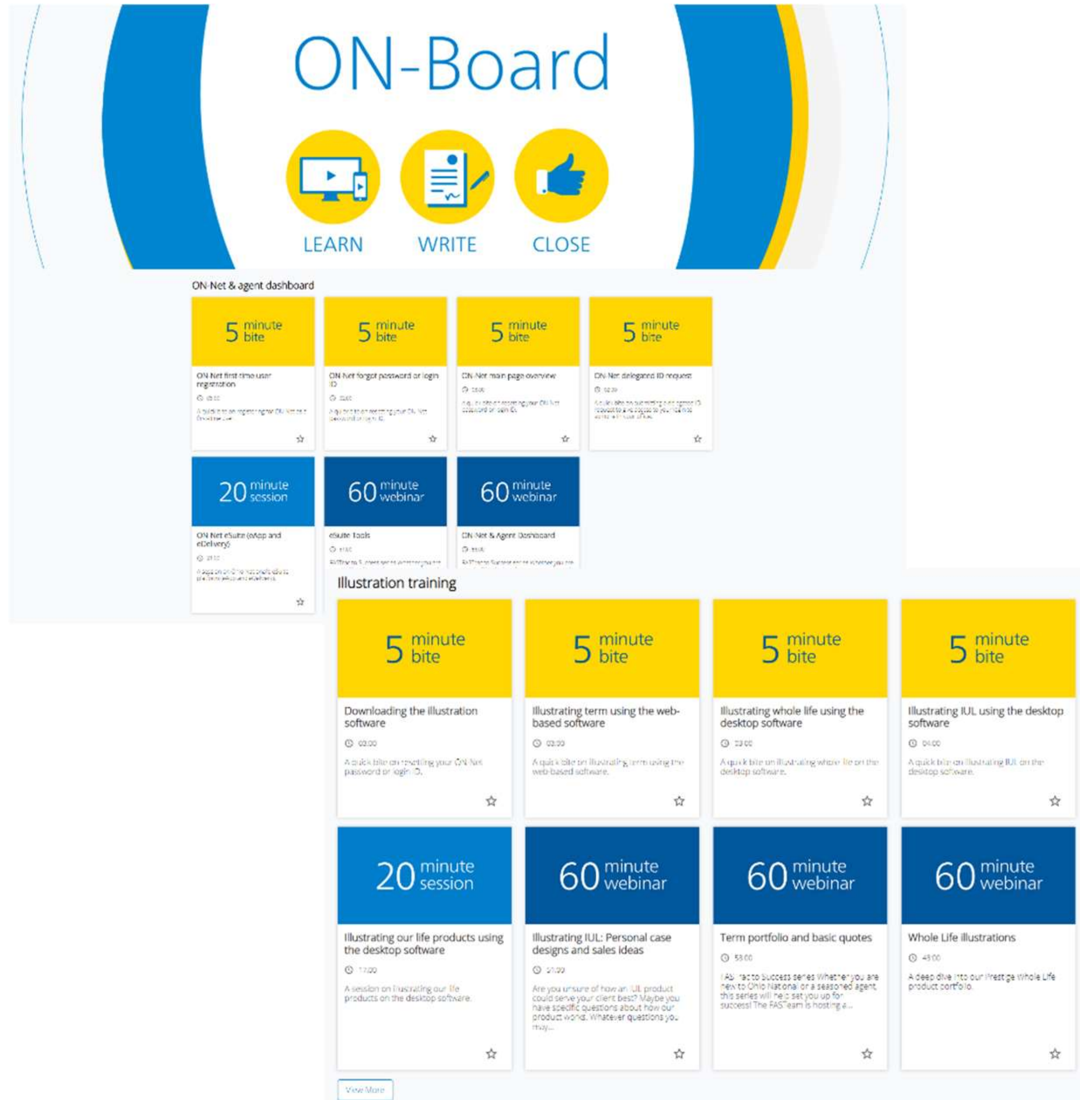
Marketing
Ohio National

MICROSITE FOR ONBOARDING AND TRAINING

- Microsite for financial professionals for on-demand access to training
- Content included quick, 5 minute “bites” and more in-depth training
- Users could subscribe to content, or recruiters could email content to financial professionals
- Also used content in email campaigns and journeys
- View microsite

  https://gateway.on24.com/wcc/eh/2503131

Please note: Since Ohio National was acquired, some content may no longer be accessible or may require registration



Marketing
Ohio National

INTERACTIVE BUSINESS DEVELOPMENT MODULES

- Modules included:
  - Vision and mission
  - Recruiting value
  - Recruiting activity
  - Five markets
  - Diverse recruiting
  - Interview guide
- Developed for agencies/firms to learn about and document business development activities
- For use by trainers in small groups

Marketing
Ohio National

PRODUCT MARKETING

- Created and distributed content for national product launches including marketing guides for financial professionals, client guides, microsites, podcasts, emails, training, events, etc.
- Microsite for financial professionals

  https://www.iwl4life.com/

- Microsite for clients

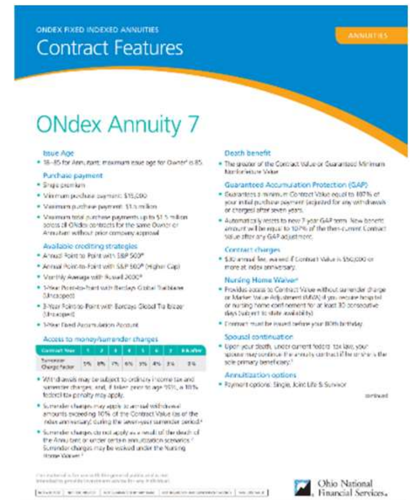
  https://cloud.mc.ohionational.com/iwl4you/home

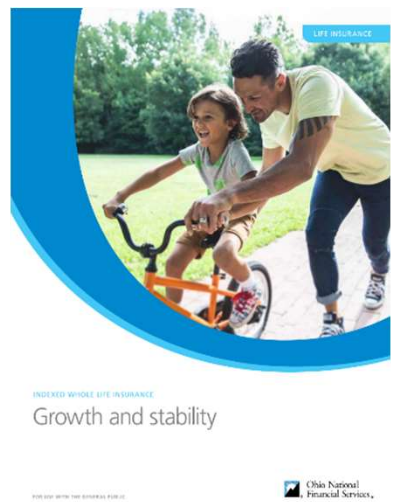
- Podcasts

  https://www.spreaker.com/user/augustar-financial--11243165

Now you can get indexed-based growth combined with the guarantees of a whole life policy. It's called indexed whole life, only from Ohio National. Let's discuss what it can do for you. #IndexedWholeLife

Permanent protection, fixed premiums, significant growth potential. That's indexed whole life, only from Ohio National. Reach out to me now to learn more. #IndexedWholeLife





Marketing
Ohio National

THOUGHT LEADERSHIP/PRESS RELEASE CONTENT

- Broker World 2022 Carrier Forecast

  https://brokerworldmag.com/ohio-national-2022-carrier-forecast/

- Press release re: new websites

  https://www.globenewswire.com/news-release/2021/10/07/2310600/0/en/Ohio-National-launches-new-websites-for-prospective-financial-professionals.html

- Thought leadership article

  https://www.financial-planning.com/opinion/the-inflation-effect-on-fixed-indexed-annuities

BROKER WORLD

Ohio National 2022 Carrier Forecast

By Barbara A Turner - January 1, 2022

In November 2020, I wrote that 2020 was a year that no one saw coming. We had experienced a global pandemic, continued low interest rates and increased market volatility. Many believed that things had to improve for 2021, that the pandemic would wind down, and the new year would bring great things to our industry and economy.

Unfortunately, 2021 presented many of the same challenges as 2020—and a good deal more. While I was hoping for a calmer year, I remain very optimistic about the future of our industry. Life insurance will continue to play a valuable role in supporting the nation's economy and, most importantly, our policyholders.

I am proud to have the opportunity to lead an organization like Ohio National, where our Mission centers on helping individuals, families, businesses and communities achieve financial security and independence. I am also excited about what lies ahead for us.

Ohio National Financial Services®
Life changes. We'll be there.®

***Source:** Ohio National Financial Services*

October 07, 2021 10:00 ET

Ohio National launches new websites for prospective financial professionals

Clean-sheet, mobile-optimized site redesigns offer personalized content, increased functionality, and timely look and feel

Website redesigns facilitate seamless, productive communication between Ohio National and prospective financial professionals

New websites adhere to Ohio National's continuing philosophy for engaging financial professionals: It's their business, their vision, and we can help.

CINCINNATI, Oct. 07, 2021 (GLOBE NEWSWIRE) -- Ohio National Financial Services is pleased to announce the relaunch of its two recruiting websites for financial professionals.

The all-new joinohionational.com gives prospective financial professionals a look into the independent contract options and insurance products backed by the financial strength of Ohio National, including life and disability income insurance and annuities.

The other redesigned site, joinonesco.com, provides a 360-degree view of the company's affiliated full-service broker/dealer, The O.N. Equity Sales Company (ONESCO).

These key assets in the company's digital space are engineered from the ground up to give visitors access to intuitive decision-making tools and actionable information. "Our goal with these sites is to make it easier for financial professionals and entrepreneurs to learn exactly what they can expect from us, in terms of product, service and philosophy," said Jill Hartmann, vice president of distribution marketing and communications. "We appreciate that it's their business and their vision. What we want to convey is how we can help. The new sites do just that in an environment that's quick to navigate, imaginative and full of useful information."

Both sites follow a fresh, approachable design aesthetic that incorporates expressive illustrations, relatable characters and concise messages that can be read at a glance.

New and enhanced site functionality includes:

FinancialPlanning

TAX INVESTING PRACTICE MANAGEMENT REGULATION AND COMPLIANCE TECH INDUSTRY OPIN

RETIREMENT

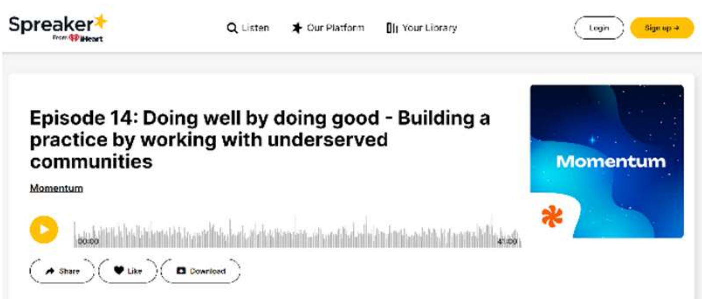
Voices The inflation effect on fixed indexed annuities

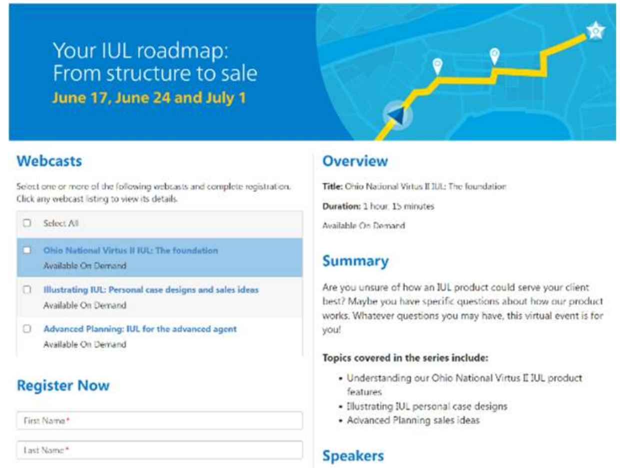
By John Grevas February 22, 2022, 7:22 p.m. EST 4 Min Read

Marketing
Ohio National

ADDITIONAL MARKETING CONTENT

- Webinar registration (via ON24)
- Customizable marketing materials
- Regional meeting promotion
- “How much life insurance do I need?” client video
  https://vimeo.com/339587419
- “Take a look at Ohio National” field video
  https://vimeo.com/762753197/7c5ae7db7f
- DE&I podcast: “Doing well by doing good”
  https://www.spreaker.com/episode/episode-14-doing-well-by-doing-good-building-a-practice-by-working-with-underserved-communities--45727117





Take a look at Ohio National

Marketing
Ohio National

ADDITIONAL MARKETING CONTENT

- Event planning and management
- Policyholder communications
- Email campaigns

Ohio National Financial Services. ON News

Now available: New Prestige Indexed 10 Pay whc
offers growth and protection

Ohio National's new Prestige Indexed 10 Pay whole life – the only pr
its kind in the industry – is now available for sale. With the stable, gu
growth and guaranteed premiums you'd expect from a whole life poli
product also offers index-based growth opportunities, allowing for sig
growth and income potential.

Learn more by checking out these new marketing materials at iwl4life

- New competitive flyer, demonstrating how we stack up against competition
- IWL client guide
- IWL owner's guide

Join us on Sept. 8, for our "All about IWL" webinar, which will inc
sales ideas, a discussion of where the product fits in the market and
stacks up against the competition. Join us and ask your questions during this
special live event.

Register now | Sept. 8 at 2 p.m. EDT

To view this email as a web page, go here.

Ohio National Financial Services. ON News

Use eSuite to help your year-end sales

Ohio National's web-based eSuite can greatly impact the speed in which your business gets processed and placed. Check out the eApp overview, demo and FAQ on ON-Net.

You also have two more months to possibly earn a cash bonus on your NAFYC through the "It Pays to Protect" sales contest! Don't let this opportunity slip by.

Click here to check out three reasons to write business with Ohio National in a brief video from Pat McEvoy, senior vice president, Life Distribution and Sales.

Ohio National Financial Services.

Dear Policyholder,

At Ohio National, our mission is to make a difference in your life by helping you achieve financial security and independence today - and for generations to come. Your whole life insurance policy dividend is one of the most visible ways we deliver on our commitment. Indeed, we have paid dividends each year since 1924.

The Ohio National Life Insurance Company Board of Directors approved a dividend interest factor of 4.00% for your participating whole life policy, effective January 1, 2023.

We estimate the 2023 dividend total will be approximately $87 million. This represents a significant return of value to you, our policyholder. While dividends are not guaranteed, we have a 99-year history of paying dividends.

We appreciate the opportunity to continue to serve you in the future.

Sincerely,

Matt Davis
Vice President, Insurance Operations

For current ratings information, please see www.ohionational.com.

Dividends for Ohio National's open whole life block issued after mutual holding company reorganization on 8/1/98 are, in all respects, subject to the Open Block Life Dividend Framework.

Whole Life insurance is issued by The Ohio National Life Insurance Company. Dividends are not guaranteed. Product availability varies by state. Company not licensed to do business in NY.

1261 11/22

President's Inner Circle standings now available

Prepare to be enchanted by The Cloister at Sea Island, Georgia. As the only resort in the world to achieve four Forbes Five-Stars 13 years in a row, it exudes true luxury and is the perfect home for Ohio National's 2023 President's Inner Circle.

View qualification standings

Convention dashboards and standings now available!

The convention dashboard tracks your status toward meeting the four requirements to qualify for Council of Honor. Click here for your personalized dashboard! Learn more about this destination and qualification details on ON-Net.