



Retaining assets when a client passes away can be a major challenge. The latest Inherited IRA sales solution is designed to help you retain current assets and grow your book of business.

Conserve More Assets Upon Death of a Client

Show your clients how they can turn their IRA into lifetime income for the next generation. Use the [restricted beneficiary form](#) to designate that upon death, the IRA will be reclassified as an Inherited IRA and leverage the new client brochure to show beneficiaries the value of lifetime income.

[ACCESS THE FORM »](#)

Find New Assets through CPAs and Attorneys

CPAs and Attorneys are often the first to be consulted when their clients are receiving an inheritance. Clients they may be working with today or in the future can avoid a major tax hit from a lump sum distribution and turn their Inherited IRA into a source of lifetime income with [this new client brochure](#).

[DOWNLOAD THE BROCHURE »](#)

Athene is the only company in the industry that can illustrate a lifetime income rider on an Inherited IRA to leverage this sales opportunity.

Start to grow and retain more assets today!



Call me at 877-645-4939 to request
an Inherited IRA illustration today!

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