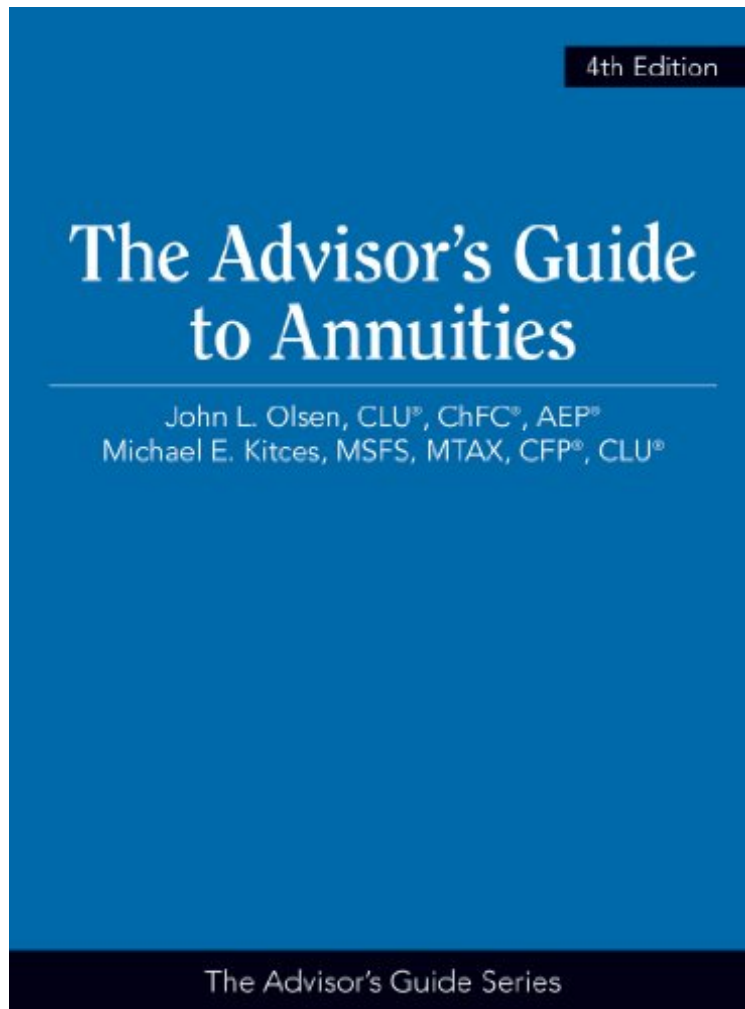


The Advisor's Guide to Annuities

*AE*Preg; John L. Olsen, CLUreg; Michael E. Kitces
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AEPreg; **John L. Olsen, CLU**reg; **Michael E. Kitces** : **The Advisor's Guide to Annuities** before purchasing it in order to gage whether or not it would be worth my time, and all praised The Advisor's Guide to Annuities:

The stakes are high. Today, in certain circumstances, fixed annuity agents may get in serious trouble just for selling fixed annuities. Idquo;Source of fundsrdquo; issues have raised many complicated questions about whether, or when, annuity agents are directly or indirectly providing investment advice. Anyone and everyone working in the annuities area must be fully informed of these issues in order to avoid the potentially serious consequences that can arise.This comprehensive, single-volume guide to annuities enables you to avoid pitfalls and:

- Make the best use of all types of annuities
- Handle both the investment and risk management goals of annuities
- Increase your understanding of not only how to sell annuities but how they work, when they should be used, and which sales

techniques are best suited to which circumstances. In these pages you'll find full coverage of:

- The threats posed by "source of funds" issues
- New Chapter
- The value of annuitization, including analysis of recent and controversial studies on this subject
- Valuable new information on structured product-based variable annuities
- Updated and expanded discussion of Deferred Income Annuities (DIAs)
- Current coverage of annuity-related tax developments, including the rules on post-death 1035 exchanges
- A complete update on the new QLAC regulations
- Added material to index annuity section
- Full update on the Neasham case and its implications for insurance agents and financial advisors

Written by two of the foremost experts in this field, *The Advisor's Guide to Annuities, 4th Edition*, is designed specifically to help you make the most of all the opportunities and avoid complications in this active and ever-changing area.