

EDUCATIONAL RESOURCES

Advanced Markets Group Content Catalog



Presentation Titles

Continuing
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Workshops

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Family and Financial Impacts

Engaging With Female Clients



Have You Stress Tested Your Practice



New Retirement Income Reality

Preparing Clients for 2026 – The Fiscal
Cliff Returns

Real Fear of Missing Out



Risks to Retirement and How to Navigate Them



Roth IRA: 9 Ways In, 2 Ways Out



Seeking Tax Alpha



Telling the RILA Story



The Thin Line Between Wealth & Legacy



Trust Planning Using Annuities



Understanding Social Security



Viewpoints Economics Update



¹ Multiple continuing education (CE) and designation credits are available. Hours vary by state.

Super CE Topics

(CE1608) FINANCIAL PLANNING & ETHICS

(CE 1708) FINANCIAL STRATEGIES, DOL UPDATES & ETHICS

(CE 1810) PRINCIPLES OF LIFE/HEALTH INSURANCE & ETHICS

(CE 1811) ELEMENTS OF INSURANCE & ETHICS

(CE 2008) ELEMENTS OF INSURANCE, LAW, ETHICS & DIVERSITY

(CE 2010) LIFE/HEALTH INSURANCE, ETHICS, LAW & DIVERSITY

(1815) MASTERING LIFE & HEALTH INSURANCE & ETHICS

Presentation Descriptions

Alzheimer's – Family and Financial Impacts

A growing number of people are being affected and becoming concerned with the potential impact of healthcare costs in retirement. As the U.S. population of 65+ year olds continues to grow, the number of people dealing with cognitive decline is also projected to increase. This discussion provides awareness around the cost of care, potential effects to caregivers and loved ones and the importance of proper planning prior to a potential Alzheimer's diagnosis.

Engaging with Female Clients

Did you know 70% of women seek a new financial professional within one year of the death of their spouse? Women are often underserved in the financial services market and have a critical need for guidance because of longevity risk and increased health care costs. This presentation delivers ideas on how to work with women and ways to incorporate guaranteed income into the retirement income plan.

Have You Stress Tested Your Practice?

Just like losing clients is rarely a pleasant occurrence for a financial planning practice, losing assets can also damage the value of your business. Developing strategies and solutions to help protect the business from taxation, systematic withdrawals, required minimum distributions, and potential long-term care needs will become more important as your clients continue to age. This discussion will help Financial Professionals better understand how to minimize the impact of current & future distributions on their business.

New Retirement Income Reality

Retirees face a number of financial risks, including market fluctuation, potential health care costs, inflation and spousal death. This presentation explores different sources of income for retirees and compares how effective each is against the risks retirees face.

Preparing Clients for 2026 – The Return of the Fiscal Cliff

2025 will be an important year in Washington D.C. The United States federal government faces fiscal challenges on a variety of fronts. The federal debt, budget deficits, and strains on federal entitlement programs due to changing population demographics have created these challenges. This discussion focuses on some of these issues, potential solutions and how to help prepare clients for what may be to come in 2026.

Real Fear of Missing Out-Coaching Clients Through Volatility

This course examines how market volatility can impact a clients' behavior when it comes to their retirement plans. We examine the nature of risk and the importance of staying invested over time to help achieve their goals.

Risks to Retirement and How to Navigate Them

Retirement represents the largest financial decision of many people's lives. A sound plan for retirement focuses on a variety of factors, including budgeting and cash flow, investment planning, and risk management. This discussion focuses on some of the more significant risks people may face in retirement and provides potential product options that can help people protect what they've earned and ensure it lasts.

Roth IRAs: 9 Ways In, 2 Ways Out

A Roth IRA is a retirement account that offers after tax contributions, tax deferred growth and qualified distributions are tax free. This presentation explains the regulations that govern the contributions; rollovers, transfers, excess contributions, re-characterizations, conversions and distributions. Also covered are deadlines, and IRS reporting requirements for Roth IRA contributions.

Seeking Tax Alpha in a Changing Tax Environment.

Differentiating your business can help capture new clients and increase sales to existing clients. How can financial professionals incorporate tax planning into their offerings as a way to differentiate their practice? This presentation introduces the concept of adding “Alpha” through tax planning and provides a variety of strategies that can help clients minimize, defer, or eliminate taxes as they are planning for and transitioning into retirement.

Telling the RILA Story

Since their development in 2010, Registered Index Linked Annuities (RILA) have become the fastest growing annuity category and are projected to continue growing in popularity in the coming years. RILAs provide investors with a level of protection coupled with growth opportunities to help meet their long-term retirement investment and income needs. This course will help financial professionals better understand RILA products.

Thin Line Between Wealth and Legacy

There is a \$70 Trillion dollar transition of wealth expected to occur over the next few decades. Many investors are unaware or uncertain of how to efficiently plan for this historic transfer of wealth. This presentation covers the importance of protecting, preserving and effectively transferring wealth to multiple generations through beneficiary, trust planning and business succession planning.

Trust Planning Using Annuities

Annuities can play an important role as a part of a comprehensive estate plan. Clients using trusts may benefit from using annuities for a portion of the trust assets. This discussion covers how to title trust owned annuities, taxation of irrevocable non-grantor trusts and examples of how trust owned annuities could potentially improve a trust planning strategy.

Understanding Social Security

Timing is everything; especially when it comes to your clients’ Social Security benefits. This presentation addresses reasons why people file for benefits early, discusses the benefits of waiting until Full Retirement Age or later, and details strategies for married couples, divorcees and widows who may want to maximize their Social Security benefits.

Where Do We Grow from Here – Industry Update and Outlook

This industry update discusses the retirement market opportunity, along with consumer and financial professional feedback around the life and annuity industry. The presentation will recap potential implications of the 2022 capital markets and economic environment as well as forecast where the life and annuity businesses are projected to go in the near future.

Viewpoints – Quarterly Market & Economic Update

Investors are grappling with the changes in geopolitical landscape as well as market volatility, high inflation, and growing concerns around the interest rate environment. What does it all mean for the economy and markets? How can you help guide clients through these topics? During this session, we discuss how these changing economic conditions may impact clients’ long-term retirement savings and income goals.

Super CE Courses (offered through Pohs Institute)¹

Financial Planning & Ethics

This course is designed to educate insurance producers in the financial planning process. Finding the right balance of insurance and financial products for their client is essential. Ethical and fiduciary responsibilities of the producer round out the course.

Financial Strategies, DOL Updates & Ethics

Building on our Financial Planning & Ethics course, this course provides the insurance producer with an extensive review of the financial planning process, including advanced level concepts and examples. It delves into the important DOL updates, and case studies about their ethical and fiduciary responsibilities.

Mastering Life & Health Insurance & Ethics

This course details Financial Planning and Ethics. It reviews legal and ethical behavior as well as agent responsibilities when working with clients to reach their financial objectives in all aspects of insurance.

Principles Of Life/Health Insurance & Ethics

This course provides the insurance producer with an extensive review of the Life/Health insurance industry. It also delves into a discussion on IRAs and annuities, followed by a broad assessment of insurance products, and including case studies of the ethical and fiduciary responsibilities of an insurance producer

Elements Of Insurance & Ethics

This course provides the insurance producer with an extensive review of the insurance industry in general. It delves into discussions on Life & Health insurance, LTC coverages, Property & Casualty insurance, insurance delivery systems and more. It is followed by a broad assessment of all insurance products. It also includes a discussion and multiple case studies on the ethical and fiduciary responsibilities of an insurance producer.

Elements Of Insurance, Law, Ethics & Diversity (Available in NY only)

This course provides the insurance producer with an extensive review of the insurance industry in general. It delves into discussions on Life & Health insurance, LTC coverages, Property & Casualty insurance, insurance delivery systems and more. It is followed by a broad assessment of all insurance products. It also includes a discussion and multiple case studies on the ethical and fiduciary responsibilities of an insurance producer.

Life/Health Insurance, Ethics, Law & Diversity (Available in NY, TX, SD and UT only)

This course provides the insurance producer with an extensive review of the Life/Health insurance industry. It also delves into a discussion on IRAs and annuities, followed by a broad assessment of insurance products, and including case studies of the ethical and fiduciary responsibilities of an insurance producer.

¹ Multiple continuing education (CE) and designation credits are available. Hours vary by state.



We're Brighthouse Financial

We are on a mission to help people
achieve financial security.

As one of the largest providers of annuities and life insurance in the U.S.,² we specialize in products designed to help people protect what they've earned and ensure it lasts. We are built on a foundation of experience and knowledge, which allows us to keep our promises and provide the value they deserve.

² Ranked by 2022 admitted assets. Best's Review®: Top 200 U.S. Life/Health Insurers. AM Best, 2023.

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