



2026 DISTRIBUTION AND MARKETING CONFERENCE

Agility in Action

**Transform Your Go-to-Market:
Customer-Centric for Lasting
Impact**





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Session Overview

When we drive engagement through meaningful conversations, product demand and sales follow.

- **Customer-Centric Marketing Strategy**
- **Actionable Insights**
- **Key Takeaways**

Why Relevance Drives Engagement



Clients and financial professionals want more than features—they want relevance.

To meet that expectation, marketing and sales must lead with:

- Customer-led conversations.
- Insight-driven storytelling.
- Experience-focused delivery.

The Shift: Product Push → Customer Pull

Customer Pull in Action

- Focus on client goals first.
- Use insights for relevance.
- Simplify with storytelling.

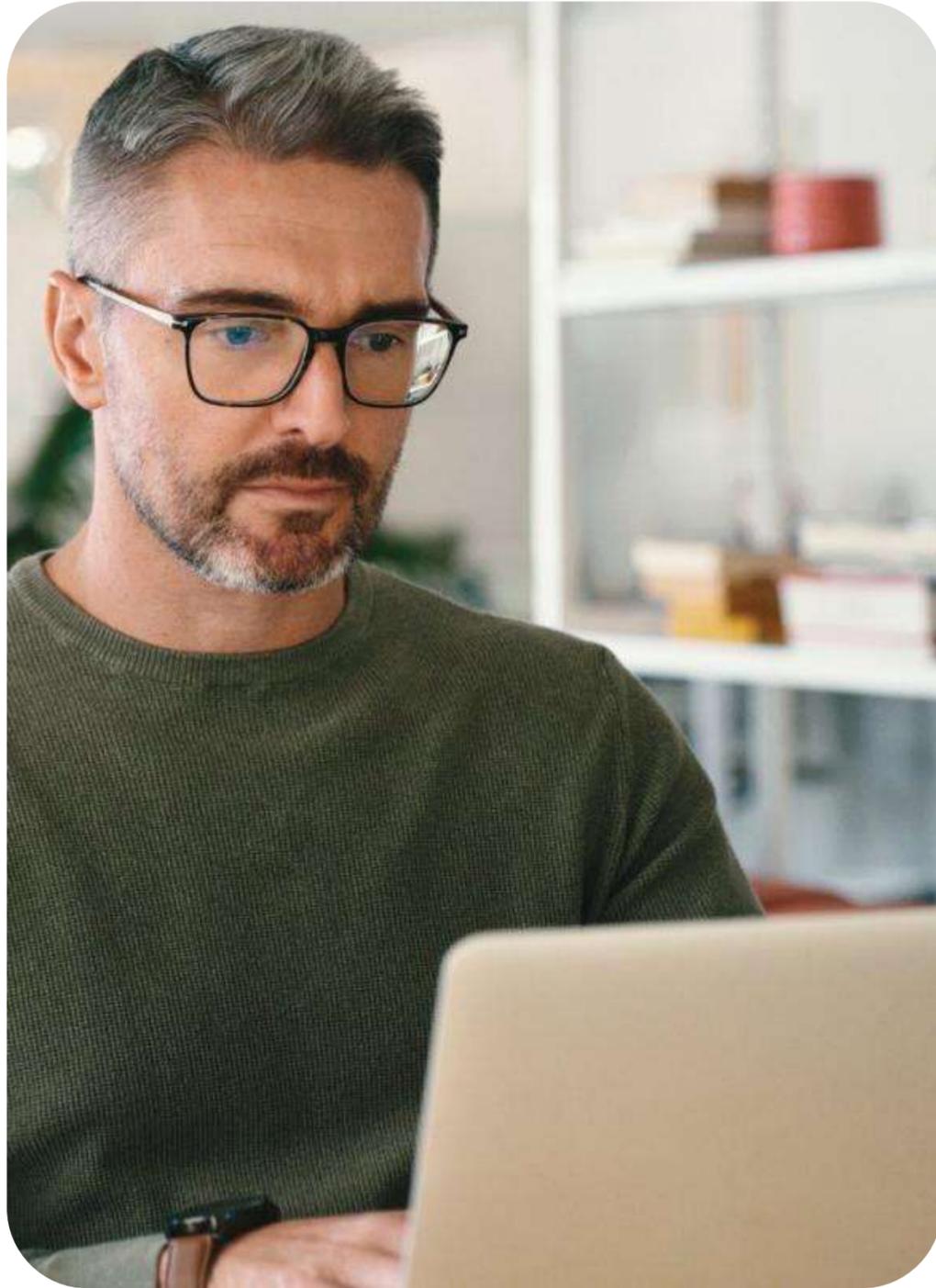
Business Impact

- Increase engagement.
- Greater customer trust.
- Improve adoption and growth.
- Increase new sales and retention.

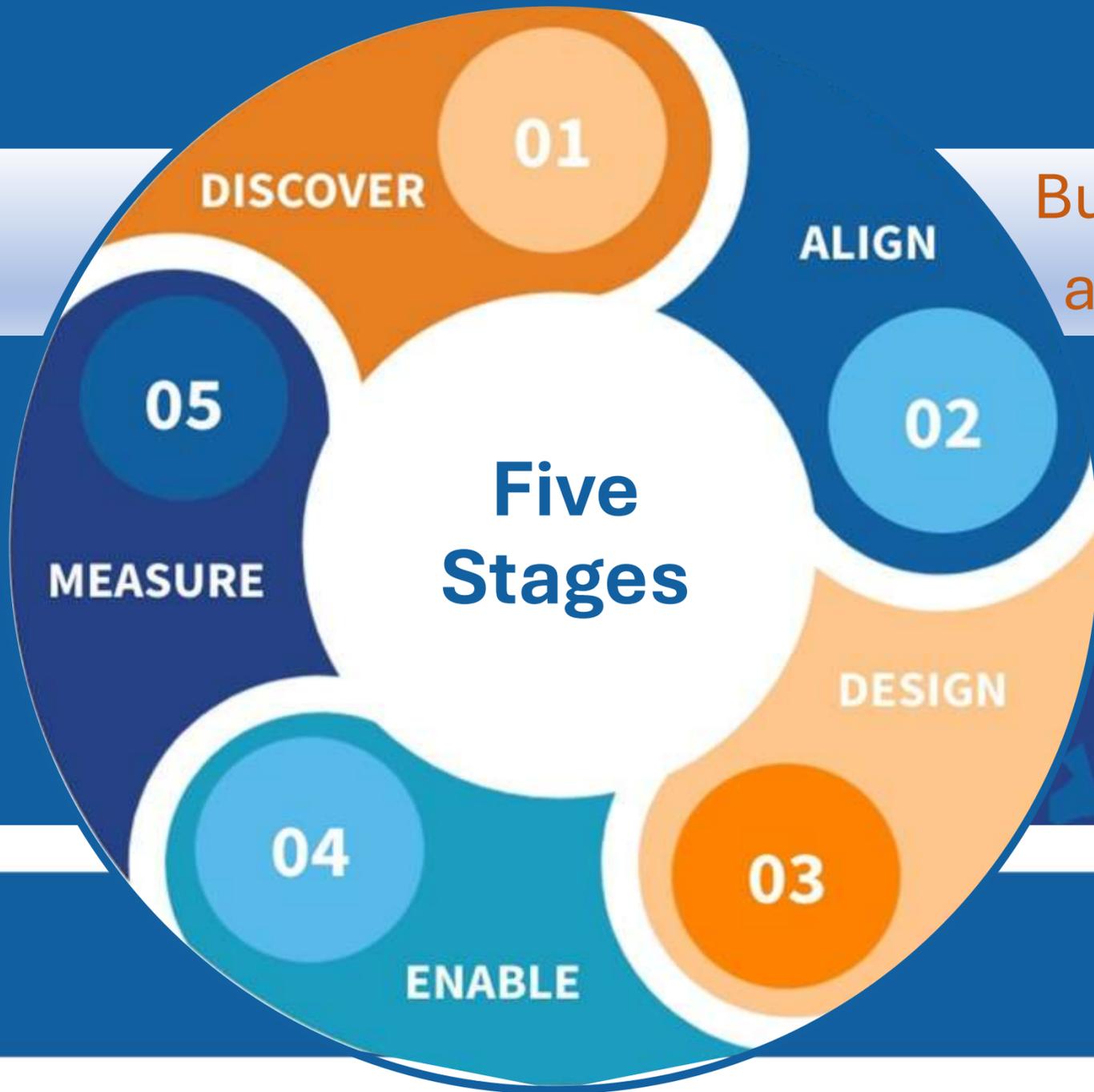
Pull the Customer in:

- With goals + what matters.
- Questions to surface concerns before solutions.
- Make it easy to re-engage - simple choices + multi-touch follow-up.

Identifying Needs and Pain Points



- Understand financial professional and client reality.
- Surface true friction.
- Validate with insight.
- Translate insight into action.



Built through insights and deep partnerships and collaboration across sales & marketing

Customer Pull Framework

Research Helps Us Discover

- Consumer and investor insights.
- Longitudinal data and trends.
- Segmentation.

Key LIMRA Insights Available

- [Life insurance Barometer Study](#)
- [Retirement Investors Report](#)
- [Retail Retirement Reference Guide](#)
- [Impact of FP in Retirement Security](#)
- [U.S. Individual Annuity Yearbook](#)

LIMRA doesn't just tell us what people own — it helps us understand why people hesitate, what builds confidence and where relevance breaks down.

2 Align: Turning Insight into Focus with Shared Direction

Alignment through Strategic Intent

- Lead with real concerns, not products.
- Enable planning-first, protection-anchored conversations.
- Create a shared expectations across sales and marketing before anything is built.

Without alignment, teams build more content.

With alignment, teams build the right experience — focused, relevant and designed to guide real conversations.

3 Design: Building the Complete Experience

Design to help financial professionals guide their clients – not sell.

Take Insight to Market

- Create guided presentations for story-telling with case studies.
- Use client-led moments—that surface needs before solutions.
- Structure strategies, steps and objections into a clear planning path.
- Content designed to use across meetings and channels.

4 Enable: Delivering the Experience

Activation through Enablement

- Reinforce adoption.
- Coordinate promotions.
- Enable outcome with tools and content to use with clients.

Enable isn't about more content. It's about making the right experience easy to adopt and hard to ignore.



5 Measure: Closing the Loop

Measurement

- Field engagement and adoption.
- Spike in sales activity.
- Effectiveness of insights, tools and activation.

Evolve

- Refine future insights.
- Improve design and enablement.
- Scale what works, evolve what doesn't.



**Measurement
fuels continuous
improvement
across the
Customer Pull
framework.**



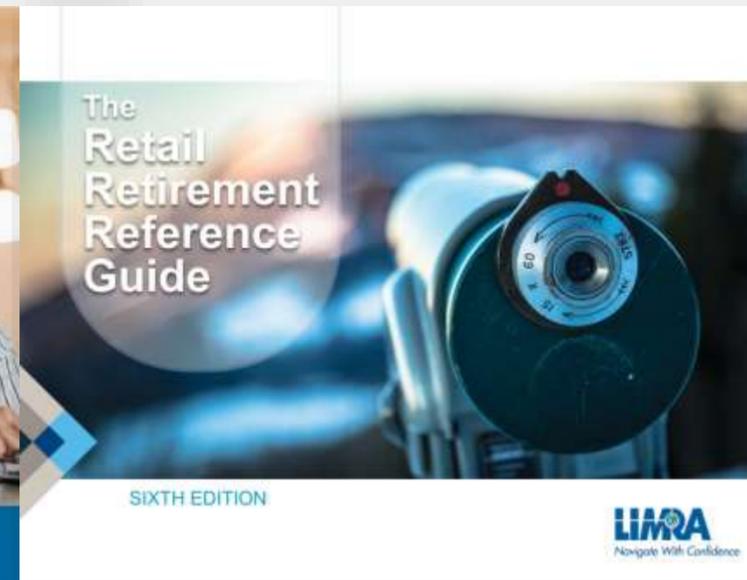
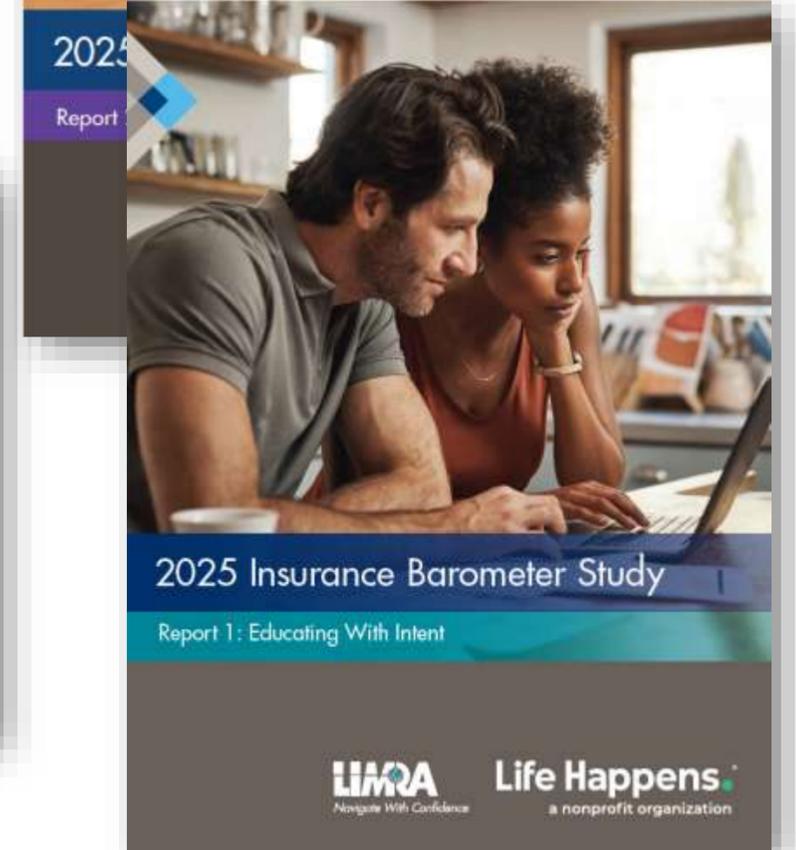
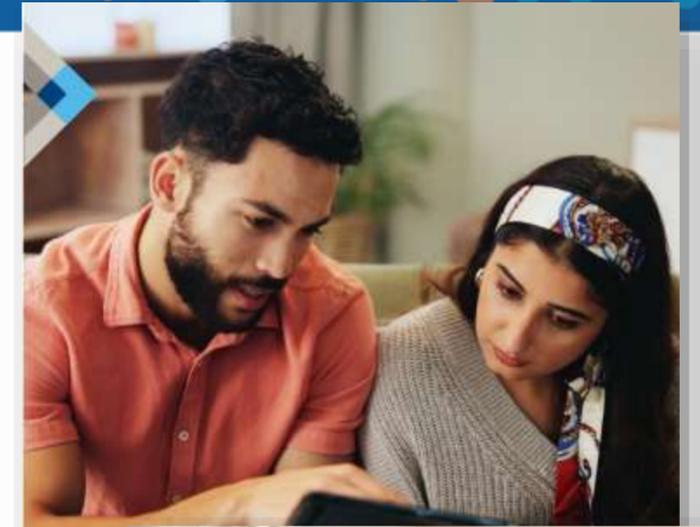
Ameritas Case Study



1 Discover: Insights Identified

Two Insights Uncovered:

- Health events create major, under-planned financial risk.
- Retirement confidence is challenged by longevity and market uncertainty.



2 Align: Alignment to Products



Insights Aligned to Life and Annuity Products:

- **Planning for health events:** Insurance and annuity riders can support flexibility during serious illness.
- **Rethinking retirement:** Insurance and annuities positioned for protection, growth potential and lifetime income.

3 Design: Determine Key Message and Build

Key Messages

- Planning for life events related to health.
- Rethinking retirement strategies.

Create Packages

- Insight-led planning concepts.
- Guided presentations with real-world scenarios.
- Client-led moments that surface needs.
- Supporting tools and resources.
- Packaged for real conversations across channels.

Insights for Wealth

How to Prevent Identity Theft
January 22, 2026 | 8 min read

Three Resolutions
January

Why Retirement Matters
December

[See More Wealth Insights](#)

Elevate Your Planning Conversations

- Use the EY study as a conversation starter.
- Visualize outcomes with planning tools.
- Position IUL as a strategic asset.
- Tailor strategies to client goals.

Resources

- Blog: [Using Annuities and Life Insurance for Retirement Planning](#)
- [SIUL product guide](#)
- [Value Plus IUL product guide](#)
- Client blog: [How a Flexible Retirement Plan Supports Stability](#)

John and Susan: Case Study

- Couple: Age 45
- \$250,000 household income
- \$475,000 current net worth

Household Salary	Total Annual Savings	Qualified Savings	Taxable Savings
\$250,000	20% of salary	15.6% of salary	4.4% of salary
Total Net Worth	Current Qualified Assets	Current Taxable Assets	Time Horizon
\$250,000	\$400,000	\$75,000	50 years

For financial professionals use only. Not for use with clients.

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4 Enable: Train and Reinforce

Deliver

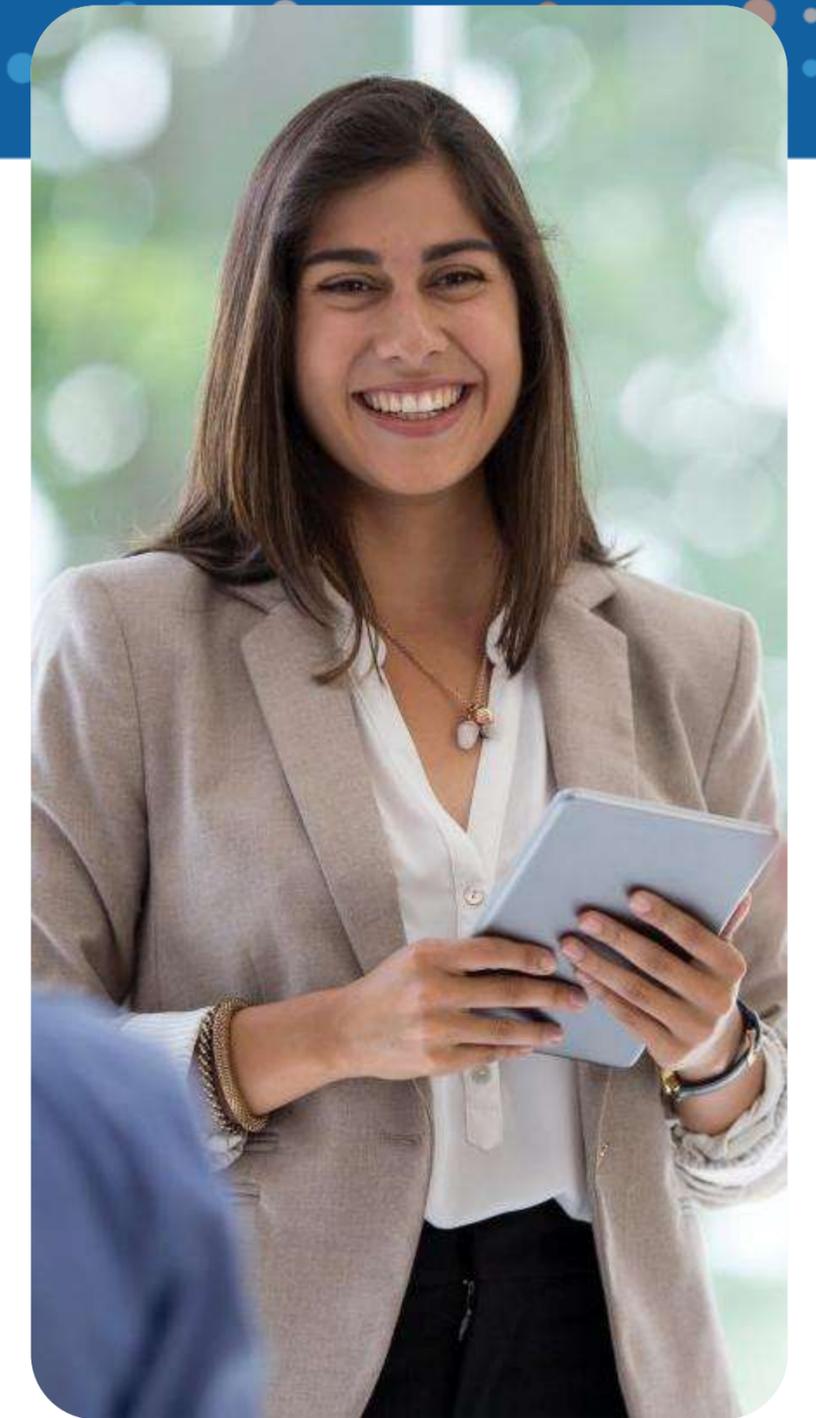
- Train sales teams.
- The presentation serves as the hub with tools and client-ready resources.

Reinforce Intentionally

- Coordinated, multi-channel promotion with ongoing reinforcement.

Enable Outcome

- Financial professionals see, hear and experience the same story repeatedly.



Navigate With Confidence



5 Measure: Refine, Simplify and Scale



Quarterly Retrospect

- Sustained field engagement across quarterly planning experiences.
- Strong adoption of insight-led blog content.
- Repeat use of core assets when experiences are packaged and reinforced.
- High engagement quality, not just reach, across presentation, tools and resources.
- Ultimate key measurement is sales.



Challenges: Earning Attention, Alignment and Adoption

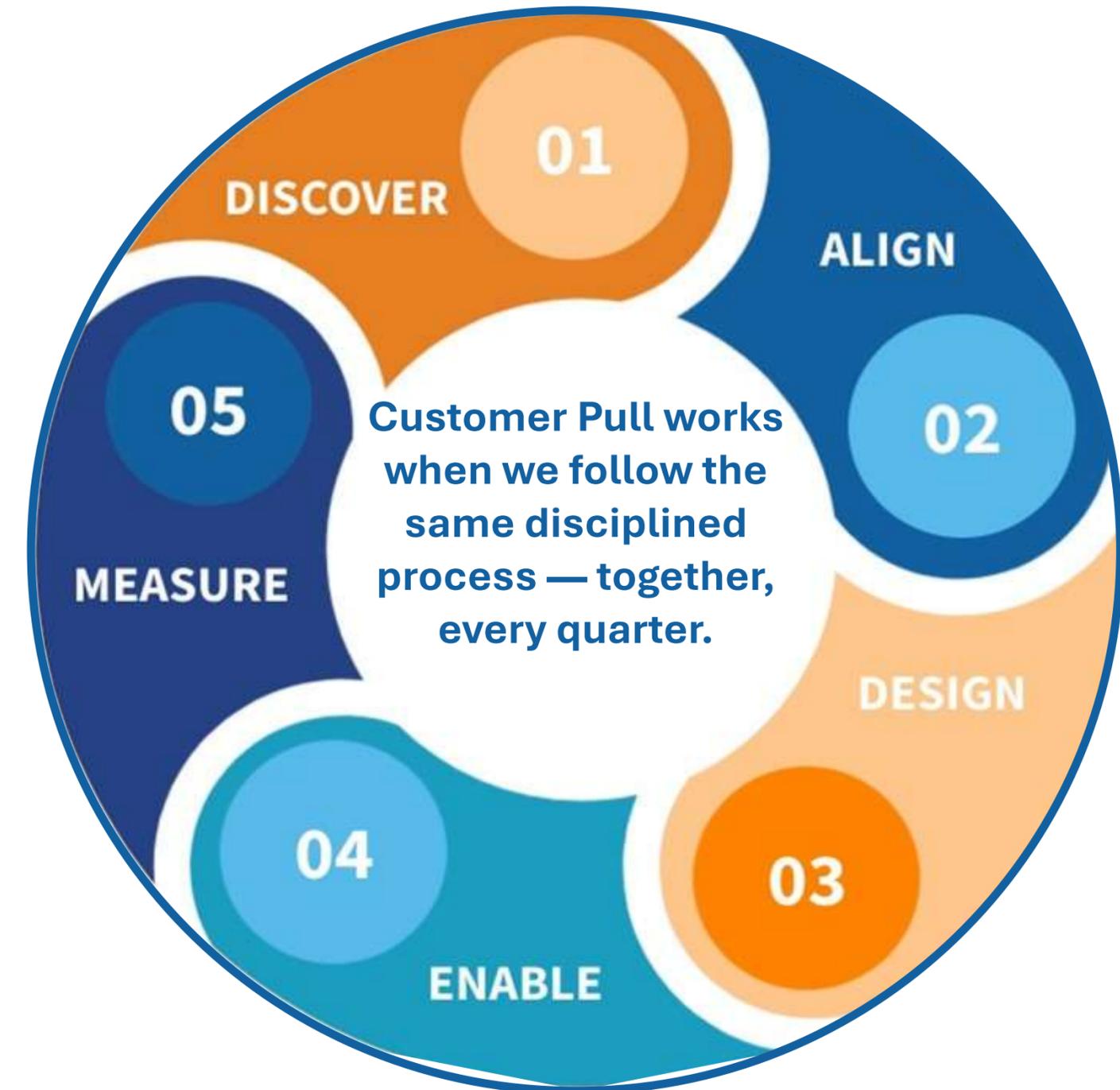
The Reality Across Field, Sales and Marketing

- Competing priorities and constant noise.
- Limited time to absorb and adopt new ideas.
- Product-heavy habits with legacy approaches.
- Lack of confidence in holistic planning conversations.
- Consumer confusion around complex solutions.
- Need for emotional, more relevant narratives.

Winning adoption requires focus — together, not separately.

A Simple Playbook to Get Started

1. **Discover** the insights.
2. **Align** internal teams to one priority concept.
3. **Design** a guided strategy experience.
4. **Enable** through training, tools and coordinated promotion.
5. **Measure** adoption and refine the next cycle.



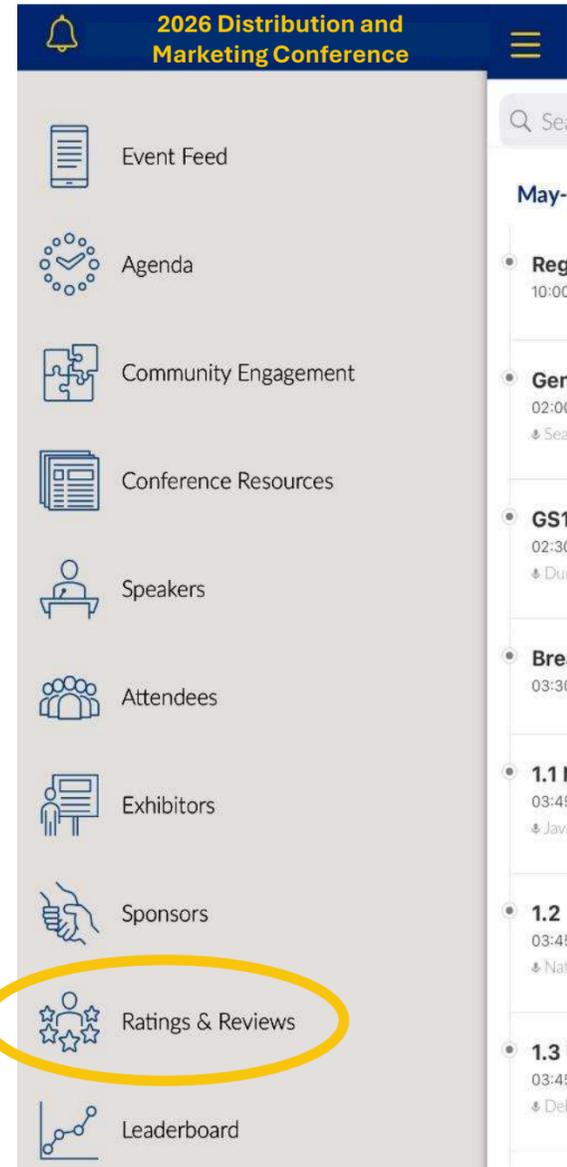


Questions

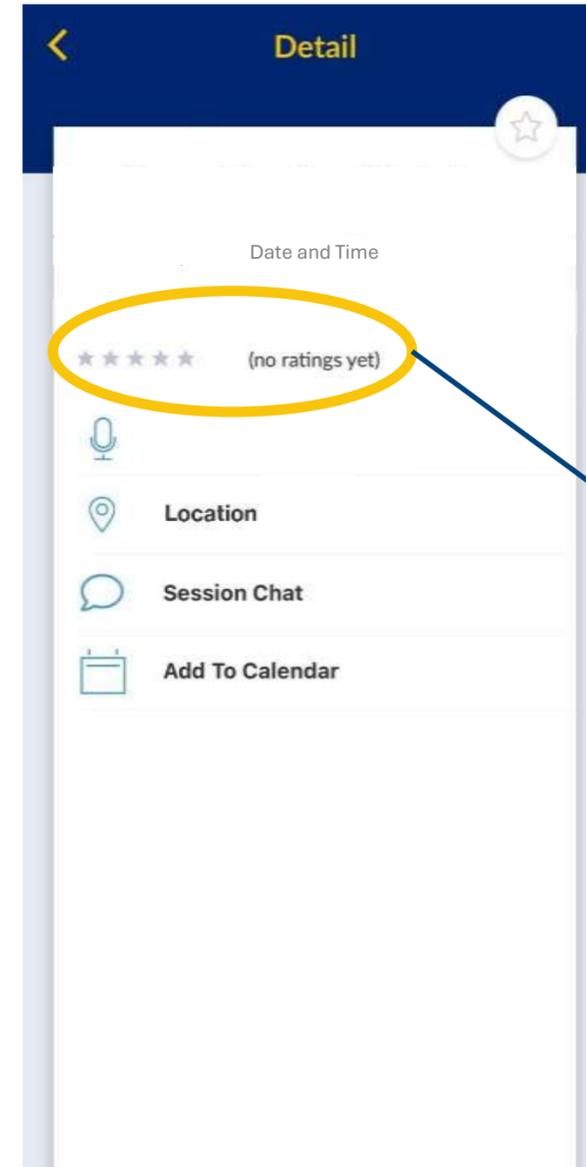


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