SEC rule 498A:
Improve the investor experience and your bottom line

New SEC rules allow variable annuity and variable life insurance issuers to create summary prospectuses, making it easier for investors to understand contract features, fees and risks.

Today, variable annuity and variable life product issuers are required to inundate investors with a mountain of paper.

Rule 498A enables layered disclosure, minimizing paper, reducing costs and creating a better experience for investors.

THE NEW RULE TAKES EFFECT
JULY 1, 2020
AND WILL MARK AN INFLECTION POINT BETWEEN OLD AND NEW

Talk to us. Let us help you create a rule 498A implementation roadmap.
Contact Gavin Long today: Gavin.Long@Broadridge.com or +1 978 247 7304.