

Mathews/Forehand Master SnapShot by Carrier

Date From: 03/01/2025 To:08/29/2025

APV Cap per app: \$7,500

Carrier	% of total submitted	Capped Submitted	Net Placed	% of placed to submitted	
American Amicable	4.50%	\$63,655.32	\$32,646.48	51.30%	
American General (AIG-Corebridge)	2.50%	\$35,178.72	\$38,931.00	110.70%	Strong to use for Guaranteed Issue
Americo	9.10%	\$128,351.40	\$106,376.94	82.90%	Losing favor over the last 3-months due to new chargeback rules
Assurity	0.10%	\$1,609.20	\$1,345.32	83.60%	
Athene Annuity	2.20%	\$31,808.80	\$61,800.62	194.30%	
Banner	4.30%	\$60,867.00	\$43,344.60	71.20%	Banner is coming on strong. Great product & price
Fidelity and Guaranty	11.90%	\$168,795.45	\$120,068.16	71.10%	Our Top IUL recommendation for mid-level to advanced IUL's
Fidelity and Guaranty Life Annuity	0.70%	\$10,500.00	\$1,612.92	15.40%	
Foresters	7.10%	\$100,772.76	\$58,037.92	57.60%	Placement rate is a little low, but seems to be improving
Foresters DFL	0.90%	\$12,180.00	\$5,916.00	48.60%	
Gerber Life	1.00%	\$13,929.12	\$11,893.97	85.40%	
John Hancock	0.10%	\$1,178.76	\$0.00	0.00%	
Mutual of Omaha	20.10%	\$284,939.66	\$212,207.12	74.50%	MOO is a consistently strong partner
Mutual Trust Life	13.20%	\$187,125.82	\$121,950.94	65.20%	Our Top Participating WL and SPWL as often used for IBC/DFL and resets
Mutual Trust Life Annuity	0.00%	\$0.00	\$10,555.18	NA	
NLG	2.50%	\$35,316.84	\$22,126.12	62.70%	Favors healthier people, use sparingly and/or under your mentor's advise
North American Annuity	2.60%	\$36,277.71	\$20,760.42	57.20%	
Occidental	0.00%	\$0.00	\$731.04	NA	
Royal Neighbors	0.00%	\$0.00	\$0.00	NA	
SBLI	1.40%	\$19,704.48	\$10,153.05	51.50%	
Security Benefit Annuity	7.90%	\$112,480.89	\$76,788.52	68.30%	Strong for High-performing Indexed Annuities
TransAmerica	3.30%	\$46,768.56	\$14,247.00	30.50%	
United Home Life	4.60%	\$65,635.56	\$77,628.46	118.30%	Very strong for critical period and less healthy people
Total	100.00%	\$1,417,076.05	\$1,049,121.77	74.00%	