Delaware Life®

National Sales Consulting

"Wisdom is not a product of schooling
but of the lifelong attempt to acquire it."

– Albert Einstein

Helping financial professionals build their business and simplify complex client planning

Who we are

The National Sales Consulting (NSC) team at Delaware Life Insurance Company (Delaware Life) is a team of highly educated, experienced professionals who are go-to consultants on income and tax planning and business-building strategies. They can provide actionable sales ideas, meaningful content, resources and tools that are rich in advisor education and practice management, as well as ways to help simplify complex planning issues for clients.

Team members have advanced degrees and designations, including JD, LLM, MBA in Finance and Marketing, CFP® professional, CIMA® and CPWA®.

What we do

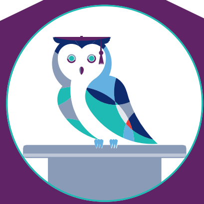
Our consultants, working with our sales team, will provide:

- presentations at office meetings
- educational programs
- dedicated internal support

Delaware Life Income Planning Institute℠

Educational programs to help financial professionals specialize in retirement income

The Institute focuses on the key income-planning areas of risk management, distribution strategies and tax planning. There are three program levels: Foundational addresses key topics, core builds and expands on the topics, and advanced aims to help financial professionals put their knowledge into action with case studies. Our consultants are a dedicated resource to deliver these programs.



Delaware Life Income Planning Institute℠

Knowledge, implementation strategies and client-facing deliverables

	Risk	Distribution	Tax
Advanced	How to motivate clients to act	Customized distribution plans: case studies & creative solutions	Tax-savvy strategies for affluent clients: Case studies in action
Core	Manage retirement risks to help maximize clients' "peace of mind"	Crucial distribution conversations with clients in their fifties	Hidden tax traps
Foundational	Retirement income planning best practices	Three distribution blind spots to watch out for	The tax journey: Accumulation to wealth transfer

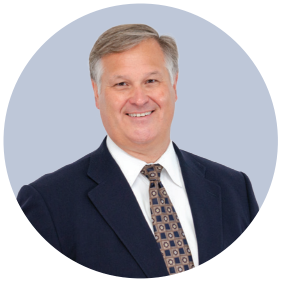
Meet our team

Curt Olson, VP, Head of National Sales Consulting

An industry leader with more than 30 years in financial services, Curt is responsible for setting the strategy and vision for the National Sales Consulting team. His experience includes product management with a large broker-dealer, sales and relationship management with asset managers and insurance companies and an executive leadership role with one of the major financial planning software companies.

Sandy McGuire, AVP, MBA, Marketing & Sales Director, Series 6, 7, 63

Sandy is responsible for researching, developing and designing content for the NSC team. She has more than 25 years in financial services in sales, national account management and marketing for well-known asset managers.



Anders Smith, CFP®, CIMA®, CPWA®, RMA®, Series 7, 63

With more than 30 years in the financial services industry, Anders can share proven retirement income, advanced sales and practice management strategies to help build a successful and profitable business. He is a nationally known speaker at industry events.

Jeng Chiu, JD, CFP®, Series 7, 24, 63

Jeng has worked with financial professionals, CPAs and other financial and legal professionals for more than 20 years, leading hundreds of client seminars, continuing education courses and advanced planning topics at regional and national conferences.

Brendan Payne, JD, LLM, Series 7, 63

A tax expert, Brendan has worked in the annuity industry for nearly a decade. He has a knack for turning complex client situations into easy-to-understand sales strategies. Brendan has a Tax LLM from the University of Denver.

Val Sender, ChFC®, MBA, CLU®, CFS®, Series 6, 7, 24, 26, 63, Life and Health

With his many more than 20 years in the financial services industry, Val knows how to motivate and educate financial professionals on how to drive sales. He has in-depth knowledge of financial products.

“

We want to help financial professionals be successful. That means sharing ways to be better at their job—to become more knowledgeable, more efficient, and increase business and profits.”

— Curt Olson, Vice President,
Head of National Sales Consulting at Delaware Life

Delivering pure value with clarity, trust and real results

At Delaware Life, we've made it our mission to deliver value and results to everyone we work with by:

- Building our client-focused products with straightforward features, appealing indexes and reasonable fees—plain and simple.
- Making products available to knowledgeable financial representatives who deliver those products with clarity and integrity to help clients make smart decisions to protect their savings and build for the future.
- Creating a seamless, accurate service experience.

Learn more about the value we can bring to financial professionals and their clients

Our goal is to help financial professionals be successful.

Please contact the Delaware Life National Sales Consulting Team for additional information at:

- **855-NSC-OWLS (855-672-6957)**
- **NationalSalesConsulting@DLMarketing.com**

Visit the Delaware Life Income Planning Institute℠ website at Delawarelife.com/advisors. (First-time visitors will be asked to register.)

Delaware Life®

delawarelife.com

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Delaware Life Insurance Company (Waltham, MA) is authorized to transact business in all states (except New York), the District of Columbia, Puerto Rico and the U.S. Virgin Islands and is a member of Group One Thousand One, LLC (Group1001).

This communication is for informational purposes only. It is not intended to provide, and should not be interpreted as, individualized investment, legal or tax advice. To obtain such advice, please consult with the appropriate professional.

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