

LIFE INSURANCE IN QUALIFIED PLANS

Carrier	Will Carrier Allow QP Ownership?	Available Products	Documents Required	Can Sell in Defined Benefit Plans?	Can Sell in 412 Plans?
AIG	No		NA		
Banner Life	No		NA		
Bestow	No		NA		
Equitable	Yes	All products except BrightLife Term One	Plan Installation Form	Yes	No
F&G Life	No	N/A	N/A	NA	No
Foresters Financial	No		NA		
Global Atlantic	No		NA		
John Hancock	Yes	All Permanent Products	84-24 Fiduciary Approval Form Certification by Trustee Form	Yes	No
Lincoln Financial	Yes	All Products Available	Disclosure, Acknowledgement and Indemnity Agreement Form	Yes	No
Mutual Of Omaha	No		NA		
Nationwide	No		NA		
New York Life	No		NA		
North American	No		NA		
OneAmerica	No		NA		
Principal	Yes	All Products Available	None	Yes	No
Protective	No		NA		
Prudential	No		NA		
Sagicor	No		NA		
Securian Financial	Yes	All Products Available	None	Yes	No
Symetra	No		NA		
Transamerica	No		NA		
William Penn	No		NA		
Zurich	Yes	Select IUL and Wealth Builder IUL	QP Disclosure: Select IUL QP Disclosure: Wealth Builder IUL Copy of the Qualified Plan Agreement	Yes	With Home Office Approval

Updated 4/6/22

For informational purposes only. Not Binding. Please consult carrier documentation for additional details.