

Rafferty Annuity **Framing LLC**

**“Better Framing Builds
Better Sales”**



John R. Rafferty, Principal



Challenge and expand conventional wisdom on annuity markets



Broaden understanding of annuity opportunities, sharpen value articulation, improve annuity sales



Help annuity wholesalers, financial professionals, sales desks, marketing, and training staff

**Available for pro-bono annuity education for church groups and non-profits*

Rafferty Annuity
Framing LLC

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Publications

- National Underwriter
- NAIFA Advisor Today
- Insurance News Net
- LIMRA Secured Retirement Institute

“I worked with John for several years and he did an excellent job in helping us both assess distribution challenges, and subsequently create innovative marketing solutions to address these challenges.”

- Dan Guilbert, President, Individual Life and Retirement, Symetra (retired)

About Me

The value of annuities really comes to life when put in the proper context. It's all about the framing.

I have built and managed annuity marketing and sales organizations, developed sales concepts and collateral, delivered countless presentations, and written numerous industry articles on annuities over a 35-year career.

Let me help you and your teams by leveraging my experience for the benefit of wholesalers, financial professionals, and client education.

Why Call?

Rafferty Annuity Framing LLC specializes in helping professionals identify, reframe, and articulate scalable opportunities where annuities can improve client outcomes.

Relevant Products and Features:
VA, FIA, FA, RILA, SPIA/DIA, LBs

Sample Topics (customizable):

- Low Rates and High Multiples: Where annuities shine
- Social Security: Use the annual statement, start conversations
- Avoiding forced sequence risk
- Conversion therapy: Assets to Income is the new metric system
- Is 3% the new 4%?
- Quit talking %, start talking \$
- A more efficient frontier, a sharper Sharpe ratio

Services:

- **Wholesale:** Train annuity carrier wholesalers/sales desks
- **Retail:** Train financial professionals/sales desks
- Deliver presentations at regional/national meetings
- 1:1 consultations and book reviews w/ financial professionals
- Concept and collateral development with home office Marketing and Training staff
- Virtual or In-Person

Prior Experience:

- Symetra: 2012-2021
- AIG: 2008-2012
- MassMutual: 1994-2008

Education:

- B.A. Economics, Colby College, Waterville ME
- M.A. Public Policy, Trinity College, Hartford CT
- Kellogg Executive Program, Consumer Marketing Strategy