



LAUNCHING
JANUARY 1, 2026

HIGHLY-STRUCTURED ANNUITY COMPLIANCE PLATFORM

DTCC Vendor
API Integrators

EDGAR Data/
Contract Rules
Integrators

Customer Profile/
KYC Integrators

ALIGNING INTERESTS

— THROUGH —



SCAN ME



BOSE
Headphones
Giveaway!

- ✓ WSP Integration
- ✓ Automated Documentation
- ✓ Heightened Review Process
- ✓ Duty of Care & Loyalty
- ✓ Post-Issue Surveillance
- ✓ Contract Risk Monitoring
- ✓ Reasonably Available Alternatives
- ✓ Compliance Demonstration
- ✓ Audit & Regulatory Readiness