



Eagle Life Insurance Company® Partners With InvestCloud for Tailored Approach to the Sales Experience

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InvestCloud Digital Planning enables financial professionals to conduct planning analysis using Eagle Life products

WEST DES MOINES, Iowa--(BUSINESS WIRE)--Aug. 10, 2022-- Eagle Life Insurance Company®, a provider of fixed and index annuities, has announced today that it is teaming up with InvestCloud, a global leader in digital transformation, to offer access to product details about its fixed index annuities (FIAs) via the InvestCloud platform.

Through the InvestCloud platform, financial professionals have the ability to better serve clients using digital planning technology — plugging in specific information to gauge how products will perform within a client’s holistic financial strategy.

“For Financial Professionals who offer Eagle Life FIAs, we are excited to provide a flexible, digital tool to help them zero in on unique product features that can help clients achieve their goals and meet retirement head-on,” said Eagle Life President, Graham Day.

The InvestCloud platform will include information about these Eagle Life FIA products:

- Eagle Select® Income Focus — 7-year surrender charge income FIA
- Eagle Select® Focus Series — 5- and 7-year surrender charge accumulation FIA

Tailoring options during times of market concern

The InvestCloud cloud-native platform is designed in a modular fashion to boost customizability and control. Through this robust, digital portal, financial professionals can engage with both clients and prospects, personalizing the sales process and creating an experience designed to bring confidence and interactivity.

“Populating our product information into the InvestCloud platform helps us present tailored, client-by-client strategies, versus offering one-size-fits-all plans,” said Day. “And with rising inflation, market volatility and worries about a recession, there’s no better time to reassure retirees and near-retirees that they have solid, individualized strategies for the future.”

InvestCloud Chief Marketing Officer, Mark Trousdale said: “Eagle Life has bold ambitions to digitize retirement planning and help clients achieve their life goals. With InvestCloud’s Digital Planning, Eagle Life advisors can easily produce models of their fixed income products aiding more comprehensive planning. We are excited to work closely with the Eagle Life team to support their digital transformation journey.”

ABOUT EAGLE LIFE INSURANCE COMPANY®

At Eagle Life Insurance Company®, we know retirement isn’t an ending — it’s a beginning. A time for people to live out the future they’ve envisioned. That’s why we help them build and achieve their retirement goals. We offer protection of principal, opportunities for growth and guaranteed income for life through fixed and fixed index annuities available through financial institutions and independent broker-dealers across the country. And we do it all by nurturing relationships and remaining dedicated to the people we serve. Eagle Life is a wholly-owned subsidiary of American Equity Investment Life Insurance Company® (holding company NYSE:AEL). For more information, visit eagle-lifeco.com and follow us on [LinkedIn](https://www.linkedin.com/company/eagle-life).

About InvestCloud

InvestCloud is a global company specializing in digital platforms that enable the development of financial solutions, pre-integrated into the Cloud. The company offers on-demand client experiences and intuitive operations solutions using an ever-expanding library of modular apps, resulting in powerful products. Headquartered in Los Angeles, InvestCloud has over 20 global offices including New York, London, Geneva, Singapore, Tokyo and Sydney, supporting trillions in assets across hundreds of diverse clients – from the largest banks in the world to wealth managers, asset managers and asset services companies.

For more information, visit InvestCloud.com.

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