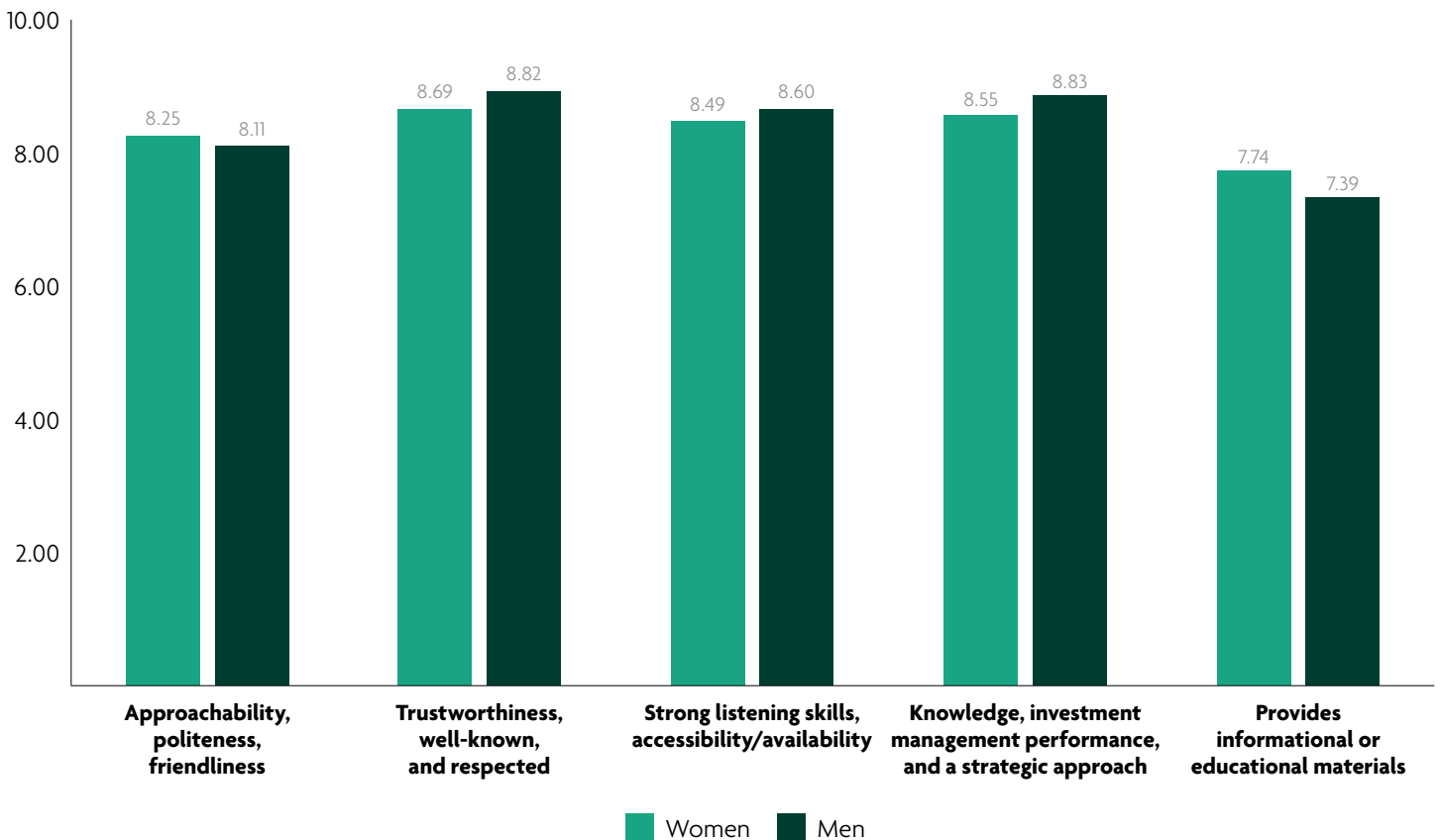


Key insights on consumer values

Issued by North American Company for Life and Health Insurance®

Building trust and connection: Strengthening relationships with couples and female clients

When it comes to working with a financial professional or advisor, men and women often share similar values and preferences. The image below represents the **most important characteristics**¹ they look for in a financial advisor.



Understanding the preferences and values of different consumer segments is key to successfully finding and retaining clients. By aligning your approach to these insights, you can build stronger, more meaningful connections with your clients and better meet their financial needs.

EMPOWERED ENCORE

Look out for more insights from Empowered Encore,
North American's latest research project,
to help you navigate this important market and
uncover additional opportunities to grow your business.

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT TO BE USED FOR CONSUMER SOLICITATION PURPOSES.

Sammons Financial[®] is the marketing name for Sammons[®] Financial Group, Inc.'s member companies, including North American Company for Life and Health Insurance[®]. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, North American Company for Life and Health Insurance.

1. Source: Sammons Financial[®] Group Empowered Encore 2024 Study