



## What is an Outsourced Insurance Desk?

Outsource your annuity and insurance business to a team of experienced and licensed experts. By partnering with an Outsourced Insurance Desk (OID), you can maximize your product offering while keeping assets under your control. Outsourcing this part of your practice eliminates many of the traditional annuity and insurance burdens and requirements.

**ENGAGE AN EXPERT** >>>



### How can OID help my practice?



Generate new advisor revenue through fee-based annuity solutions that seamlessly fit into your fee-only practice.



Gain time back by not doing product research, filling out paperwork and managing the account opening process.



Gain time back by not maintaining carrier appointments, product training and ongoing licensure requirements.

### What's the Halo advantage?



Halo Investing Insurance Services is the industry's first comprehensive OID solution – combining both technology and customer service.



Halo's platform powers the complete lifecycle management by allowing you to review and manage existing annuities in one centralized location.



Access to best-in-class annuity and insurance products and expertise.

# ACCESS BEST-IN-CLASS, FEE-BASED ANNUITY SOLUTIONS



EQUITABLE



PACIFIC LIFE

...AND MORE.

## *Fee-Based, Annuity Offerings*

Single Premium Immediate  
Multi-Year Guarantee  
Fixed Index  
Registered Index Linked  
Variable

## *Services & Support*

New Fee-Based Annuity Sales  
Review of Old Annuity Contracts  
Legacy Business  
Income Planning & Tools  
Life Insurance  
Structured Notes & Buffered ETFs

**Learn more about how Halo Investing Insurance Services can streamline your fee-based annuity and insurance business by contacting a Halo Representative at (855) 744-4256 (HALO) or [insuranceservices@haloinvesting.com](mailto:insuranceservices@haloinvesting.com)**

## **ABOUT HALO INVESTING**

Halo's award-winning technologies and experienced team helps financial advisors unlock the value of annuity solutions. As an agent of record, Halo helps advisors eliminate many licensing burdens and additional costs. Halo helps advisors make the most of these new opportunities.

## **CONTACT**



[www.haloinvesting.com](http://www.haloinvesting.com)



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